

Strategic Planning Evaluation of Creating a New Professional Association

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| Association→→→ Members | Member →→→ Benefits | Association→→→ Functions | Design →→→ Principles | Association Form |
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College Reading & Learning Association and
National Association for Developmental Education
(CRLA/NADE) Working Group Members

David Arendale
Hilda Barrow
Kathy Carpenter
Russ Hodges
Jane McGrath
Pat Newell
Jan Norton

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Introduction

Continual focus on improvement of services for its members is a hallmark of the College Reading and Learning Association (CRLA) and the National Association for Developmental Education (NADE). These two associations, along with three others in 2004 decided to conduct a joint strategic review of their organizations and the field that they serve. Previous national leaders were selected by their respective associations to serve on a Blue Ribbon Commission (BRC) and create a report based on their findings. This report is found on their website, <http://blueribboncommission.org>. The final section of the report dealt with the potential actions these organizations could engage to improve service to their members and deal with the changing environment within postsecondary education.

Rather than recommending a single future path, the BRC report instead identified three: *coordination*, *collaboration*, and *creation*. The first path would lead CRLA, NADE, and other organizations to better coordinate their activities to avoid duplication of services. The second course, collaboration, sought to find projects of mutual interest and economy that the current organizations could jointly offer to their members. The third path was creation of a new professional association with an expanded vision, mission, and resources to serve a wider group of professionals within postsecondary education.

As the BRC Report was disseminated within the postsecondary education community through the BRC website, open forums at several national conferences, and other venues of conversation, considerable discussion and excitement was generated about the possibility of creating a new professional association. In Spring 2007 the national executive boards of CRLA and NADE selected a group of past and current national leaders for a work group charged with investigating creation of a new professional association. The group completed this report during late spring and summer of 2007.

The authors of this report were guided by several overarching questions as they investigated creation of a new professional association.

1. *What form of organization is needed to perform needed functions that are essential for meeting the new mission?* This question helped the working group to first create a mission for the organization, second to identify the functions needed of the new association to meet the mission, and finally, to create the form of an organization needed to fulfill the mission and functions.
2. *Is it good for the association members?* A popular approach to making policy decisions in education has been the phrase “*Is it good for the children?*” The question shifts the attention away from traditional lobbying groups and instead focuses on the direct beneficiaries of education, the students themselves. “*Is it good for the association members?*” is our version of this question. It helped this working group to avoid an initial focus on professional association organization structures and envision what could be better for the individual professionals. Based on the discussion that ensued from discussion of those two questions, additional ones were generated. The working group identified the

following questions to pursue during the discussions. These serve as the major report sections:

1. *Why create a new professional association?*
2. *What are the potential opportunities, internal weaknesses, and external threats to a new professional association?*
3. *Who are the potential members and what benefits do they need?*
4. *What design elements are needed in the professional association to meet individual member needs?*
5. *What could a new organization look like?*
6. *What are potential “next steps” to take in pursuing this conversation and practical actions to create a new association?*

The Working Group has deliberately focused its analysis to questions revolving around the merits of creating a new professional association. There are several reasons why it intentionally has *not* pursued the idea of a merger or consolidation of organizations:

1. Creation of new professional organization permits an opportunity to expand and reinvent the vision, mission, scope for this new community of professionals. A new organization provides an opportunity for use of new language to describe itself and an expansion of the stakeholders who choose to become members and those who are served by the new association.
2. The goal is not to just create a bigger organization, much as in the business world where several similar companies merge to be more competitive simply because of their larger size and economies of scale. The focus was on a more comprehensive, “*one-stop shop*” that offers more professional development through a variety of venues.
3. Creating a new organization rather than merging old ones is essential to protect the new one from potential debts and obligations of the old one. Mergers can not only consolidate the assets of the old organizations, but also aggregate the potential financial and legal problems of one or more of the old ones. A clean slate is given to this new organization.
4. The perception by the external public is different with the creation of a new organization versus a consolidation and merger of old ones. The new association would take the best elements from its predecessors and blend with new design elements from other leading organizations.

Creating a new organization does not mean that the history and traditions of the previous ones need to be discarded and ignored. Some of the best and most cherished traditions can be retained while carefully crafting and implementing new ones to complement and enhance. The most important preservation of the past organizations are the members of these groups themselves. CRLA and NADE are not defined only by its their former conferences, publications, and awards. These associations are member-centered. If careful ground work is conducted to create an inclusive and even more beneficial professional association, this cohort of previous members will walk into the future and be joined by new colleagues as well.

This report is just another step in a wider conversation about the future. More voices, perspectives, and ideas are needed to build consensus regarding leadership actions. We have the opportunity to carefully and deliberately manage change in these turbulent times. This is a great opportunity for our profession to take bold, new steps to meet the needs both of our members and also our profession and its mission.

Section One

Executive Summary

Creating a new professional association to more effectively serve both current and potential new members has been the focus of the CRLA/NADE Working Group. The group considered not only the issue of effectiveness, but also the merits of expanding the mission and vision of a new professional association. Building upon the past success of CRLA and NADE, the Working Group identified many areas that such a new association could better serve its members and also have a greater influence in society. The major findings from this strategic review include the following:

1. Significant and systemic change is required. The external threats to the existing organizations for not engaging in dramatic change and renewal far outweigh the advantages of no change. The organizations have worked incredibly hard with a strong volunteer leadership structure to implement their strategic plans. Progress has been positive but slow and incremental due to limited resources and the volunteer leadership base available through the organizations. The organizations have been working at maximum capacity for a long time. The unmet needs of their association members require a dramatically different structure. An analogy illustrates the current state of the professional associations. A well-known parable cautions against placing *“new wine in old wineskins.”* When it was common practice to place wine in a leather pouch that was stitched together, fresh leather was always used since it would stretch when the new wine expanded during its fermentation process. Use of a previous old wineskin container that had already been stretched out would rupture if new wine was placed within it. This analogy describes why a new association *“container”* is necessary to achieve an expanded set of services for members and increased influence within society.
2. A strategic review of creating a new professional association identifies a long list of potential strengths for such a new structure. This review also identifies potential external threats and weaknesses. The Working Group identified potential solutions for dealing with each. One of the biggest challenges is the process of creating the new association. A basic law of physics is *“where there is movement, there is always friction.”* The final section in this report identifies a suggested calendar of events to engage more people in the conversation to encourage buy-in and support for change.
3. The Working Group identifies that in addition to the current profile of association members, there are other groups within postsecondary education that could find affiliation with a new organization desirable. A new association with an expanded mission, vision, and more inclusive language could encourage active membership by these groups. More than 60,000 professionals work in the field served by CRLA and NADE. However, less than 10% are members of these associations. A new association would be more attractive to these nonmembers if they could access more services through venues outside of conferences.

4. The reason for change is not rearranging organizational patterns. It is all about increasing the quality, quantity, and venues for professional development of individual members. CRLA and NADE host excellent chapter and national conferences. However, a careful review of other postsecondary professional associations finds that they offer many more services for their members through rich web sites, multiple publications, on-line conferences, webinars, and conduct research that identifies best practices for their members.
5. A new professional association serves as a catalyst for new language, expanded mission, and reinvented vision for serving a wider community. While the reason for change is about professional development and service of its members, the organizational language and structure have an impact upon the association's capacity to serve its members. Some examples of these potential changes for conversation among a larger group inside of CRLA and NADE include:
 1. More inclusive association purpose statement such as: *"The purpose of this organization is to advance the scholarship and practice of professionals dedicated to postsecondary student success through academic support and instruction"*.
 2. Provide groups of varying sizes within the larger association for members to find a comfortable place for learning, fellowship, and support. These affinity groups could be organized on the basis of job duties, topics, institutional affiliation, or other criteria.
 3. The association would be organized through major operating divisions based on major job responsibility categories (e.g., teaching reading courses, learning assistance center activities, tutoring and peer learning programs). These operating divisions would have delegated autonomy to meet the needs of members within the larger professional association.
 4. *"Knowledge Communities"* are a key element for meeting the information needs of members. More than a SIG or SPIN group, these communities both generate scholarship and provide information for members on-demand. They are a major recruitment feature for new members.
 5. Expanded national executive policy board. With the increased size and complexity of the new association, a corresponding increase of the elected leadership group is essential for leadership and stewardship. The report presents several possible patterns. However, establishing first the needs of the individual members and the essential functions of the new association should precede focus on this element. The Working Group followed the old saying *"form follows function"* with this issue.
 6. Increase in the use of professional staff. All other professional associations studied by the Working Group had one or more full-time staff members to complete essential day-to-day duties to serve the membership and support the association leadership group. The national dues for CRLA and NADE are dramatically lower than any of the other national associations studied. In addition, most of them have many more revenue sources than just the national conference to meet budget needs.
6. A wider conversation needs to occur concerning the ideas and possibilities presented in this report. The final section of this report identifies a possible scenario for this wider

discussion. The inclusion of more voices and ideas will generate an even better vision for a new future.

The pace and scope of change needs to dramatically speed-up. Rather than incremental change, dramatic reinvention and transformation is needed. A new term used to describe this change is “*leapfrogging*” (Harbison & Pekar, 1998; Nonaka & Nichiguchi, 2001). Instead of “*fixing*” an old process, it is “*leapfrogged*” and a new process is introduced. The often-cited classic example is how emerging countries are designating cell phones as the primary communication channel and skipping the wiring of the countryside with traditional telephone wires. The cost of the new technology and ease of implementation is much less than the older technology. With this report, the Working Group strongly supports the creation of a new professional association rather than attempting to retool the older ones. The synergy of a larger organization with more assets and a fresh start presents many opportunities.

This Working Group completed the first draft of this report during its meeting in Austin, TX in June 2007. The conclusion was that a new professional association would be beneficial, but the change process would be difficult and significant. Our group recognizes that the easiest course is to continue to make incremental changes within the current structures. Perhaps the umbrella group for the existing associations, American Council for Developmental Education Associations (ACDEA), could provide more coordination and collaboration for the field to better meet the needs of the members. Those are possible paths to the future. However, this Working Group recommends the path of creating a new professional association with a more inclusive language, mission, and vision for the future for all the reasons stated in this report.

A reoccurring question examined by the Working Group has been “*why change?*” This long report has carefully explored the pros and cons of creating a new association and provided numerous suggestions for its services and organization structures. The question of “*why*” is irrelevant. The better question is “*what kind of change is demanded by postsecondary education and needed by these professionals?*” Perhaps others can provide a paradigm for us when considering the future. When writing a dialogue among several of his characters in a play discussing the future, Shakespeare penned the expression “*The Undiscovered Country*” to describe this place. While everyone will visit the future, no one can come back and tell others exactly what it will be like. However, all of us will walk into The Undiscovered Country.

We have the choice regarding how we walk into the future. Change can be proactively managed or simply reacted to. The best of past traditions can be brought into the future and merged with new structures and traditions. The most important element that moves forward into the new association are members of the current organizations. They form the core of the new future and bring forward the history and traditions of the previous organizations. New members join these veterans as we walk together into The Undiscovered Country as colleagues and friends. Let’s build a new future together.

August 2007
CRLA/NADE Working Group:
David Arendale
Hilda Barrow

Kathy Carpenter
Russ Hodges
Jane McGrath
Pat Newell
Jan Norton

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Section Two

Why create a new professional association?

Major change within any organization should be carefully calculated and considered. Creation of a new professional association should be done only if there are clear and compelling arguments in its favor. The first question that the CRLA/NADE Working Group sought to answer was "What are the advantages of no change and what could be the threats to the current associations and their members without a transformation?"



What are the advantages of no change?

1. Change is difficult due to inertia and fear of the unknown.
2. Risk of the unknown.
3. Name recognition of current organizations.
4. Perception of greater intimacy with smaller organizations.
5. Complicated change process for both the national organization and the semi-autonomous nature of the chapters.
6. Concern with abandoning the familiar and changing historic traditions.
7. Some current members have been members and volunteered their entire professional careers to current organizations and may be reluctant to changing to something new and unknown.
8. Loyalty of current members with present organizations that they have been affiliated with and provided volunteer service.
9. Chapter and national conferences are smaller which some members prefer.
10. Smaller organizations perceive that their culture would be suppressed and replaced by the culture of the larger one.
11. Financial uncertainty and risk posed by a new organization.
12. Based on current organization charts, there are more nationally-elected executive board member positions distributed among all the organizations.
13. Change process will involve additional expense for new promotional materials, change in legal status, and other operational expenses.
14. More publications are available to the field due to the perception that some might be lost through closing old organizations and replacing with a new one.
15. More cities to host national conferences due to their smaller size.

What are the threats of no change?

1. This field is the only one in postsecondary education that has five major national professional associations competing with one another to serve essentially the same population. There is no central voice to represent the field and the students who are served with policy makers at the state and national level.
2. Minimal prestige associated with being a member of current professional associations due to stigma issues attached to the field by external stakeholders.
3. Lack of sufficient research and scholarship by current organizations to meet needs of their members.
4. Perception that the professional associations represent a field rather than a discipline. This perception leads to a focus only on the job site and day-to-day responsibilities and not also on creating significant scholarship.
5. More content-specific instructors (*e.g., English, mathematics*) are dropping their memberships in current associations in this field and instead affiliating with content organizations that provide services to developmental-level course instructors (*e.g., AMATYC, CCCC*).
6. Due to limited mission, stigmatized language, and current profile of members that are currently attracted, other potential membership groups do not seek affiliation.
7. Continued shift of the current professional associations of primarily serving community colleges due to perception of lack of services and stigmatizing language resulting in a lack of involvement by four-year institutions.
8. Divided assets among the multiple organizations: leaders, members, financial assets, other resources.
9. Too many leadership positions among the multiple organizations to easily find highly-qualified members to run for office.
10. Multiple organizations spend considerable resources competing with one another for essentially the same pool of potential members.
11. Duplication of professional development opportunities (*e.g., conferences*).
12. Current organizations are primarily conference hosters and organizers rather than comprehensive associations that both generate considerable scholarship and various professional development services to its members.
13. Language used to describe the field and the names of the organizations are perceived by some others as negative and limited.
14. Status quo leads to complacency and lack of innovation.
15. Many of the overlapping chapters of the various national professional associations are already combining state or regional conferences. They are already moving towards creation of a single organization representing professionals at the state or regional level.

After completing this careful analysis, the CRLA/NADE Working Group felt that the threats of no change were overwhelming compared to the reasons for no change. It is for this reason that the group strongly advocates for continuing the conversation for proactive change and transformation for the current professional associations representing the field and the students served.

Section Three

Who are the potential members and what benefits do they need?

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This report follows a sequential set of questions. The previous report section investigated the question of whether a new professional association should be considered. Based on an affirmative answer to that question, a series of new ones are investigated. As stated in the report introduction, several guiding principles help to focus the efforts of this Working Group. One principle was the old saying, “*form follows function*.” The sequential stages in the above diagram guide the group’s investigation. The elements in bold type within the diagram identify the stages that are addressed in the report section.

The first part of this report section identifies categories of professionals that are potential members of the new professional association. These groups have been placed into two categories based on the ease and likelihood of affiliation. For some categories, providing member services on-line will be especially critical. Reliance upon the national conference as the primary provider of service will be insufficient and ineffective for busy professionals with multiple job responsibilities or with adjunct/part-time status.

This section concludes with a comprehensive list of services for the potential members of the new association. The needs are based upon our Working Group’s best judgment of services needed by this diverse collection of members. This section defines the rest of the report since the functions and organization of the new professional association is designed to meet the needs of its members. This robust list of member services requires a comprehensive, coordinated, and flexible organization to meet current and future needs of the members and other stakeholders.

I. Membership Categories of the New Association

A. Primary Members for the Association Retained from the existing organizations. Many of these categories of professionals are already members of

CRLA and NADE

1. Instructors of developmental courses (English, reading, math)
2. Instructors of learning strategies courses
3. Professionals in the following areas
 - peer learning assistance programs
 - academic support programs
 - learning assistance centers

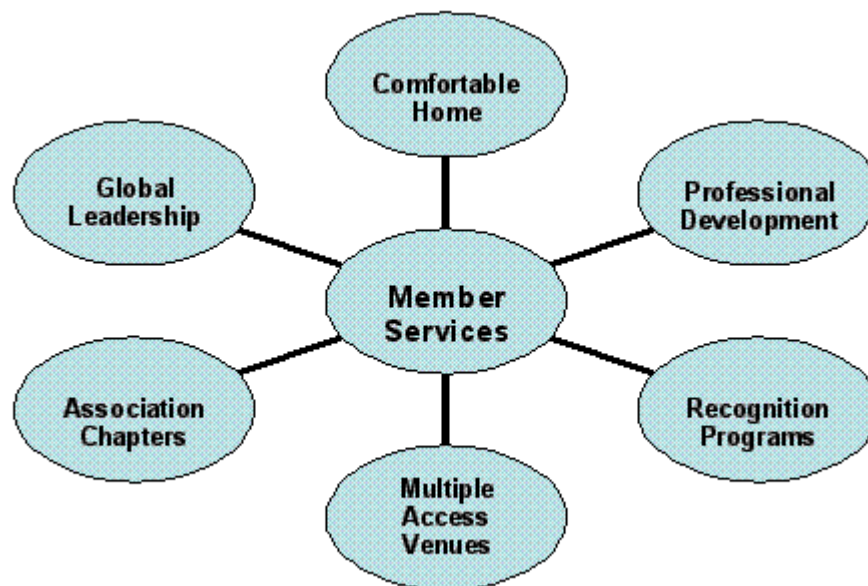
B. New Membership Groups for the Association. Some of these categories of professionals are represented in CRLA and NADE. However, there are many more from these categories who are not currently affiliated with either group.

1. peer mentoring and coaching (*academic or personal*)

2. graduate students interested in careers related to this field
3. First Year Experience courses and programs
4. TRIO administrators, staff, and faculty members
5. ESL instructors
6. learning community administrators (*for programs that include developmental-level or learning strategies courses in the learning communities*)
7. distance learning administrators concerned with providing academic support for on-line learners
8. high school-to-college bridge programs
9. administrators at the dean level or higher who have interest in the field represented by this new association

II. Services to Members of the New Professional Association.

The most important reason for creation of a new professional association is for a dramatic increase of quantity and quality of professional development services for its members.



A. Members find a comfortable and supportive “home” within the association. These communities are of varying sizes and of different types. Members have choices concerning how many and what types to join. Members create their own web of support within the larger association based on their decisions. The groups are of different types:

1. job function
2. academic content areas
3. topic areas
4. personal demographics
5. institutional characteristics.

They provide niches for those of similar interests and backgrounds to meet, share, and obtain needed information for their jobs. They provide smaller "learning spaces" and "comfort zones" for the members within the large group.

B. Comprehensive professional development services to the members. Building upon the current expertise of excellent national conferences and several journals, the new association would offer a wider array of learning opportunities.

1. More publications (*Some included with basic membership; others require additional fees. All publications would be marketed to other organizations and the general public.*). These could include practitioner-level journal(s), research journal, monographs, newsletters, books, reports, training manuals, curriculum guides, and other publications available through an enriched association web-sites.
2. Knowledge communities where members can locate specific information related to their interest and job-related questions. More than traditional SIG and SPIN groups, these communities serve as a major generator and provider of information for members.
3. Services **could be** of general interest or of a focused nature (*e.g., learning center operation, peer learning, program assessment*).

C. Recognition programs for members.

1. Professional certification for individuals or programs in learning centers, peer learning, developmental-level courses, mentoring, and tutoring that builds upon the current programs. The certification could be for individual members, student paraprofessionals, and programs.
2. Award and scholarship programs to recognize excellence in the field and support professional development as well as scholarship.
3. A wide variety of venues from which to access information, research, and support from the association. In addition to the national and chapter conferences, new venues for professional development and support are provided. These include regional training workshops, on-line workshops and webinars, and on-demand training through the association web site. In addition to traditional conferences, members could access information through more publications and their desktop computer.
4. Association chapters for members to network and access information locally throughout the U.S. and other regions of the globe. Revenue, training, and expertise would be shared with the chapters to support their work with members.
5. Provide national leadership in the field for its members: advocate, educate, establish standards, and disseminate best practices.

Section Four

What are the functions of a new professional association?

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The previous section of this report identified the potential members for this professional association and the benefits that these individuals would expect to be provided by the new organization. This report section identifies the functions and processes that the new association would need in order to provide these benefits. Based on these organization functions, this section ends with an identification of the design principles that should be followed in creating a new professional association. These principles were identified through research of other postsecondary professional associations. Appendix 3 provides the common practices of these organizations as well as one-page profiles of each. The next section will explore some possible organization patterns for the new association.

I. What are potential functions of a new professional association to meet the needs of its members?

In a previous section five fundamental categories of services for individual members were identified. These categories were used to organize the list of functions that the new association must use to meet these needs. A following report section will take this another step by identifying more specifically the organizational elements needed to manage the new association so that it meets the needs of its members.

A. Comfortable and supportive “home” within the association.

1. Organize groups of varying sizes and types to meet the personal and professional needs of its members through sharing and education
2. Bring people together for support and professional development

B. Comprehensive professional development services to the members.

1. Provide a rich selection of publications: journals, newsletters, books, monographs, training manuals, curriculum guides
2. Advance the field through research: collect data, conduct research, provide grants, train others to conduct research, identify best practices
3. Create and disseminate best practices
4. Host conferences and training workshops at the national, chapter, and virtual on-line level
5. Mentor association members and those interested in the field (*e.g., graduate students, new professionals*)
6. Provide opportunities for members to develop their leadership skills, job skills, and personal skill

C. Recognition programs for members.

1. Establish national standards of practice for the field
2. Provide certification programs for individuals and programs
3. Provide annual awards and recognition programs for individuals and programs

- D. Wide variety of venues to access information, research, and support.
 - 1. Host conferences and training workshops at the national, chapter, and virtual levels
 - 2. Support chapters and their members by the association
- E. Provide global leadership in the field for its members, policymakers, and stakeholders.
 - 1. Advocate on issues of importance to individual members and serve the public good
 - 2. Define the field and educate stakeholders and policy makers
 - 3. Establish national standards of practice
 - 4. Disseminate best practices
 - 5. Identify ethical practices for the field
 - 6. Work with other associations and organizations to advance the field and serve its members



II. Design Principles for a New Professional Association

Regardless of the specific organization, there are common design principles that can successfully guide its operation. The first part of this report section identifies more than two dozen best practices by other successful professional associations. From this large list, the following design principles have been identified as key to create a new professional association at this stage of the conversation.

- 1. Authority and responsibility is distributed more widely within the organization than the current models used by CRLA and NADE. A larger, more complex professional association will require more distribution of responsibility than currently exists. Expansion of association services is limited by the current reliance on a small number of volunteer leaders to both complete traditional executive board duties and also administer the association on a day-to-day basis. In the new professional organization, the Executive Policy Board must have more time to focus on more traditional budget formation, strategic planning, and major policy decisions and less on day-to-day management issues.
- 2. Provide a wider array of services to the members (*e.g., more professional development services such as publications, training materials, and a richer website with more materials for members-only*).
- 3. Professional development services need to be provided through a wider set of venues including on-line conferences, podcasting, webinars, telephone conferences, course management systems (*e.g., Blackboard*) and other emerging technologies. Rather than

relying on the national conference, professional development needs to be available through the member's desktop computer at work or at home.

4. The association is an active partner in research and publication of scholarship in the field. This could include collecting national data, analyzing data through its own research center, and disseminating the research and scholarship to both the members and also the wider postsecondary community and policymakers.
5. Increase the size of the association-wide Executive Policy Board. Additional board-level officers are needed due to providing leadership and mentorship for expanded services to members and representing the interests of affinity groups within the organization.
6. Expansion of paid professional staff. With higher levels of service provided to members, full-time professional staff need to be added to take on essential responsibilities such as administrative assistance, conference management, membership services, and other duties assigned by the association-wide Executive Policy Board.
7. Provide smaller groups of varying sizes within the large association. These groups are venues to locate specific information, network with colleagues of similar interests and job functions, and provide a comfortable support community.
8. Provide a variety of formal systems for providing advice and counsel for the national policy board along with other means for more participation by the rank-and-file members with advice and decision-making.
9. Diversify the income of the professional association by extending to other revenue sources other than the national conference. This would include additional books, journals, and monographs published by the association as well as additional fee-based professional development opportunities (*e.g., regional conferences on focused topics, on-line training workshops, and webinars*).
10. The association would be more involved with advocacy with the general public as well as with policy makers. The association would be more active in serving as the voice for the field and be a more active partner with other professional associations in issues related to postsecondary education as a whole and with issues of specific interest to the association's members.

Section Five

What could a new professional association look like?

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The new professional association could adopt one of a variety of forms to achieve its mission and functions. Specific and detailed organization charts are not provided in this report since the group felt that might be too provocative and draw attention from the overall design elements and preliminary ideas recommended for conversation among a larger group. Placing position titles inside of boxes and drawing lines connecting them is provided for purposes of the wider discussion. It is premature to identify a firm organization pattern until the more essential issues of member benefits, organization functions, and design considerations. Several general approaches to organization are provided in this section of the report.

Purpose

The purpose of this organization is to advance the scholarship and practice of professionals dedicated to postsecondary student success through academic support and instruction.

Organization Elements of the New Association

Several organization models are provided with no preference stated among them. They are intended to generate conversation among a wider group. The organization pattern should be based on the intended functions of the association that are essential for meeting the needs of its individual members.

There were some differences among individual CRLA/NADE Working Group members concerning all of the following components for a new association. The group felt it was more important to identify elements that could be debated and vetted by a larger group than limiting the items to only those that received a unanimous vote of approval. For example, note the various models for the composition of the association-wide Executive Policy Board. The following organization elements are the essential building blocks recommended for the new association based on successful practices by other postsecondary professional associations noted in Appendix 3 of this report..

- **General Membership.** Some venue is provided for the general membership to directly influence the decision-making process. This would require creativity for other venues than the traditional early morning membership meeting at the annual national conference that draws less than five percent of the membership. With advances in emerging technology, town hall meetings could be conducted that presented an opportunity for wider participation. More use of annual surveys of membership needs and more frequent use of membership votes on key issues would involve them in a more meaningful fashion.
- **Executive staff.** Building upon the current employment of part-time staff for membership, web site maintenance, and conference management, a full-time position would be created to increase service to members. Contingent upon growth of membership, the staff would

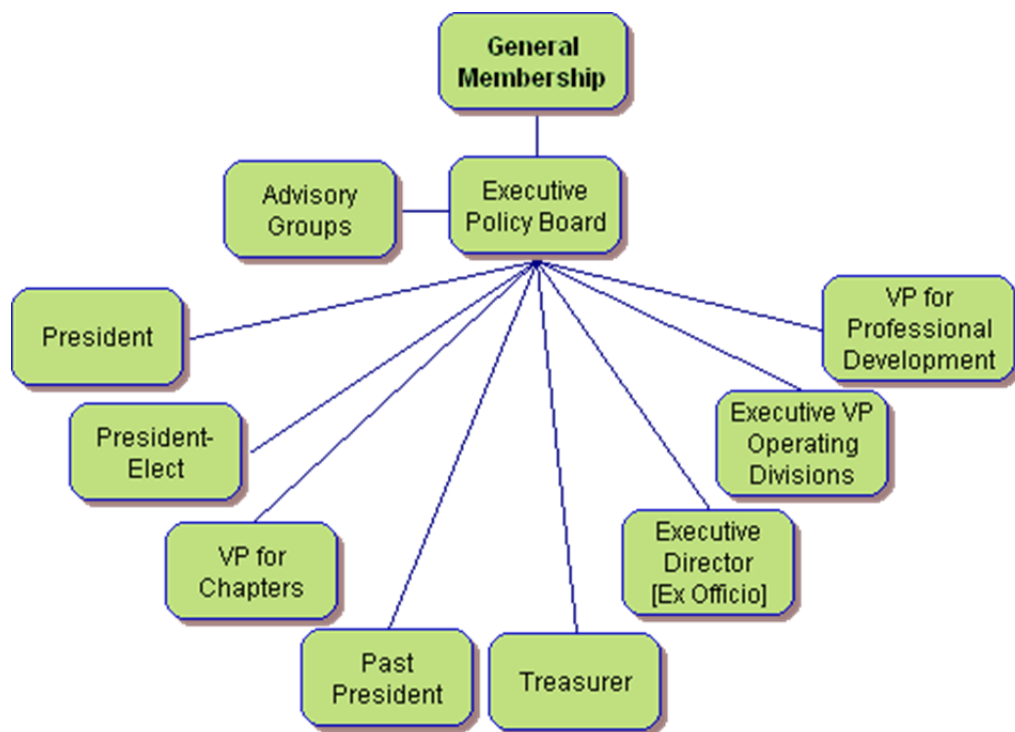
be expanded to a multi-person unit. The association office would be hosted at a postsecondary institution through a competitive bid process. The host institution would be partially reimbursed for some operating costs and other expenses would be complimentary (*e.g., office space, utilities, office furniture*).

- Advisory Groups for the Association-Wide Executive Policy Board. The following advisory groups would provide formal counsel to the association-wide Executive Policy Board. Each would have specific responsibilities and reporting lines to the board.
 - *Past Officers Council*. This would include all past association-wide Executive Policy Board members. Annual membership fee waivers would be provided for the first five years after the person leaves their elected position. The group would meet once during the annual national conference and at other times during the year through use of emerging communication technologies.
 - *Blue Ribbon Advisory Board*. These nationally- and internationally-renowned experts and leaders in the field of postsecondary education would provide advice to the association on key strategic issues. Most of these appointees would be external to the association's field. This group would be asked to provide written advice and review strategic planning documents via email. Occasional telephone conference meetings would be held annually.
 - *ACDEA Fellows*. This group would provide similar advice to the Blue Ribbon Advisory Board and communicate in the same manner. Most of these appointees would be internal to the association's field.
 - *Leadership Congress*. This group is composed of the association chapter presidents, association-wide committee chair persons, and other leaders of the association. This group would meet preceding the national conference.
 - *Town Hall Meetings*. This group is composed of the voting membership of the association. This group could meet in conjunction with the national conference and also through an on-line venue to present feedback and policy changes for consideration by the board.
- Operating Divisions. These are the largest groups within the association. An operating division is defined as having its own knowledge base, theory, research, and produces its own scholarship. All individual members would select at least one division to affiliate when joining or renewing membership. Affiliation with more than one division would incur an additional annual membership fee. Divisions would be responsible for sponsoring one or more knowledge communities, publishing a newsletter, and generating other scholarship and professional development activities for its members, and would have the opportunity to publish a journal that required an additional annual membership fee. To foster opportunity for innovation and experimentation, limited autonomy is granted to each operating division. Each division would conduct an election for a Vice President. Depending upon the composition of the association-wide Executive Policy Board discussed below, this each of the Vice Presidents might serve on the policy board or report to a VP for Operating Divisions (*see discussion of these options below*).
 - *Developmental and College Reading*. Faculty who teach these courses.
 - *Developmental and College English and Writing*. Faculty who teach these courses.
 - *Developmental and College Mathematics*. Faculty who teach these courses.

- *Learning Assistance Centers*. This includes both the administrators of these units as well as those who provide direct service to students.
 - *Tutoring/Peer-Assisted Learning*. This includes both traditional tutoring programs as well as student study groups such as Supplemental Instructional and Peer-led Team Learning.
 - *Study and Learning Strategies*. The primary members of this group are those who teach classes or provide workshops in this area.
 - *Postsecondary Education*. This general category group provides a home for members of the association that do not find a natural fit with one of the other categories. If sufficient members of a new affinity group within this Operating Division join the association, consideration could be made to establishing them as a new Operating Division.
- Knowledge Communities. These are intermediate-sized groups within the association. They provide more in-depth information on focused topics. Functions provided by these communities would include a web site with rich content materials, publications (*e.g., newsletter, monographs, and training materials*), mentors available to provide expertise to inquirers, and a listserv. This would be a significant extension and expansion of the current SIG and SPIN groups within CRLA and NADE. To assure high quality and provide mentorship for leaders, these appointed Knowledge Community leaders would report to a Vice President on the association-wide Executive Policy Board. If a Knowledge Community grew to a sufficient size, it might be granted status as an Operating Division and join the list above. The CRLA/NADE Working Group reviewed the existing SIG and SPIN groups and used that to generate an initial list of potential groups. It would be recommended for the new association to begin with a smaller list of Knowledge Communities during the pilot phase for beginning these groups. Other groups could be implemented after the first ones are successfully implemented. Knowledge focus areas could include the following.
 - administration
 - adult learners
 - brain-based learning
 - counseling and helping relationships
 - cultural diversity
 - developmental-level English/writing
 - developmental-level mathematics
 - developmental-level reading
 - graduate programs related to the field
 - learning communities
 - learning strategies
 - peer-assisted learning/tutoring
 - research and evaluation
 - students with disabilities
 - students in transition (*e.g., high school-to-college bridge programs, articulation programs for seamless K-16*)
 - teaching with technology
 - teaching indigenous populations

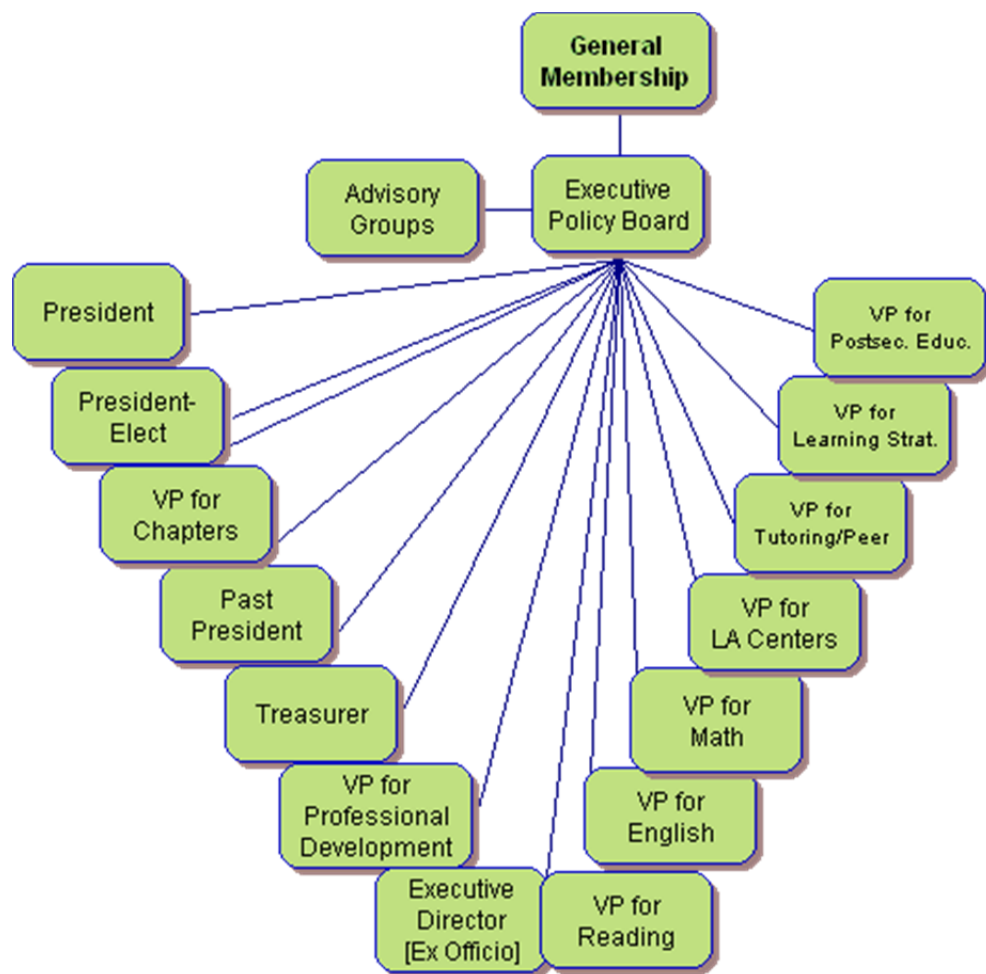
- TRIO
- workforce development
- Caucus Groups. A smaller unit within the association is a Caucus Group. This optional group is based on institutional characteristics, personal demographics, or a small number of members focused around a job function or topic. If a group grows to a sufficient size, it might be granted status as a Knowledge Community. Caucus Groups can serve as an incubator for the creation of larger affinity units within the association..
 - interest caucus (*e.g., academic support for distance learning programs, enrollment management, ESL*)
 - institutional characteristic (*e.g., private liberal arts colleges, research universities*)
 - personal demographic (*e.g., graduate students, international members, adjunct teachers--either part-time at an institution or only teach part of academic load with developmental-level courses*).
- Committees and Task Forces. The smallest unit operating within the association with a narrow function defined by the By-Laws or Association Policy Manual (*e.g., media board*). The association President would have delegated responsibility for many of these groups. Some could be assigned to others Executive Board Members. For example, Constitution and By-laws could be assigned to the Past Officers Council as part of their official duties. The association office staff could be charged with overseeing or assuming the duties of the following committees: archives, marketing, job placement, elections, and membership. Since the Executive Director of the association office staff would be present for all association-wide Executive Policy Board meetings, this person would assume the duties normally provided by an elected secretary position.
- Geographic Regions. The world would be divided into geographic regions. Chapters would operate within these regions. These chapters would either represent a single state, several contiguous states, a country (*e.g., Canada*), or region of the world (*e.g., Pacific Rim*). .
 - Autonomy issues regarding the functioning of chapters within these regions would be decided later.
 - A representative selected by the chapters located within a region would have direct representation to the association-wide policy board through a Vice President of Regions. This VP would be responsible for services to chapter leaders and regional representatives. The VP would ensure provision of training for these leaders via distance learning technologies.
 - Chapter and regional leaders would meet during the annual conference to serve as an advisory group to the association-wide policy board, participate in the annual Leadership Congress, and participate in leadership and professional development activities..
 - Annual conferences could occur at the state level or be held in conjunction with several state or regional chapters as they see fit.
 - Membership in the association provides membership in a corresponding affiliated chapter. A portion of the association dues would be shared with the chapter that serves the same geographic area as where the member works.

- Association-wide Executive Policy Board. There are several designs for this association-wide policy board. Several options are presented below. Based on best practices from other professional associations, the president of this new association would have to have previously been elected as a Vice President for one of the Operating Divisions. This is done to help orient the person to the policy board before assuming their duties as President-Elect. Due to the unique skill sets needed for the other positions, the same requirement would not be needed or might serve as an impediment for selecting the best candidate slate to run for that position through an association-wide election.
 - *Policy Board—Model #1*
 - President (*in addition to overall association leadership responsibilities, mentorship for key committees and ad hoc task forces*)
 - President-Elect (*includes responsible for liaison with the following advisory boards: Past Association-wide Officers Council, ACDEA Fellows, and External Blue Ribbon Advisory Group*)
 - Past President (*includes responsible for mentoring the annual association-wide conference planning team and continuity for new policy board members*)
 - Treasurer
 - Vice President for Professional Development (*in addition to overall leadership for professional development, the following committees would report to this person: media board for all publications, awards, scholarships, certification, professional liaison, research, and international*)
 - Executive Vice President for Operating Divisions. (*Reporting to this person would be each of the Vice President for each of the operating divisions and the Chairs of each of the Knowledge Communities*).
 - Vice President for Chapter Regions (*Responsible for chapter development and support. This person would represent interests expressed by the chapter regional representatives as well as the chapter presidents*).
 - Executive Director [Ex officio] (*in addition to other responsibilities, provides administrative support, fulfills role of board secretary, and provides continuity for new board members*)

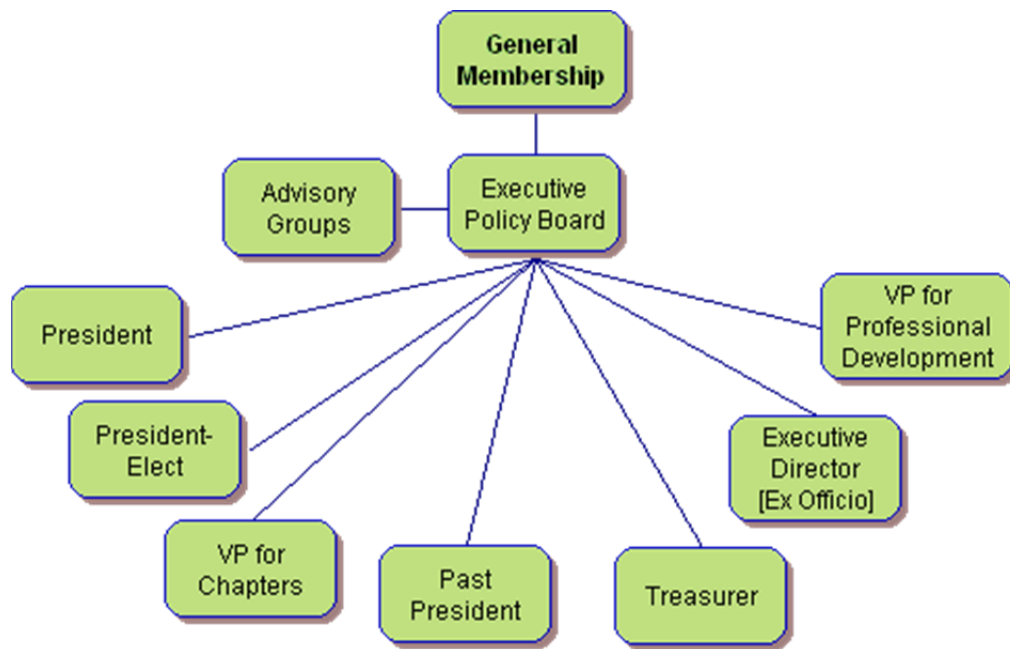


- *Policy Board—Model #2* This would be same as Model #1 except that the Vice President for each of the major operating divisions would be a formal member of the association-wide Executive Policy Board and there would be no need for an Executive Vice President. Responsibility for the Knowledge Communities would be assigned to one of the VPs for a related operating division. Another variation of this model that other major associations observe is that not all members of the policy board attend all meetings. Some have the entire group meet semi-annually while a smaller policy group meets two other times each year and additionally hold telephone conference calls.

- President
- President-Elect
- Past President
- Treasurer
- Vice President for Professional Development
- Vice President for Reading Operating Division
- Vice President for English Operating Division
- Vice President for Mathematics Operating Division
- Vice President for Learning Assistance Centers Operating Division
- Vice President for Tutoring/Peer-Assisted Learning Operating Division
- Vice President for Study and Learning Strategies Operating Division
- Vice President for Postsecondary Education Operating Division
- Vice President for Chapter Regions.
- Executive Director [Ex officio]



- *Policy Board—Model #3* This identifies the core policy group that would meet quarterly as well as by telephone periodically. The additional Vice Presidents for the seven operating divisions would participate at two of these four meetings annually.
 - President
 - President-Elect
 - Past President
 - Treasurer
 - Vice President for Professional Development
 - Vice President for Chapter Regions
 - Executive Director [Ex officio]



This report section seeks identifies some possible categories of organization patterns for the new professional association. The more critical issue is focusing on target member groups, member services, and functions of the association. The organization pattern will naturally emerge after consensus is built upon these other critical issues.

Section Six

What are potential “next steps” for the conversation?



Participants in the June 2007 meeting of the CRLA/NADE Working Group found the conversation around the issue of forming a new professional organization to be an amazing, invigorating, exhausting, complicated, and transformative experience. While the group was diverse in its representation of past and present leaders in the field, this discussion needs more voices and perspectives to enrich the discussion, commit to change, and improve the design for the future. Regardless of the final manifestation of that change, whether resulting in creation of a new organization or revision of current ones, change is inevitable. The CRLA/NADE Working Group recommends the following draft timeline of events to continue the conversation.

A. Extend the conversation to wider circles. The first audience for this report are the national executive boards for CRLA and NADE. It is important to include more stakeholder groups with consideration of this preliminary report. More voices will enrich the conversation and generate a more powerful and purposeful proposal for consideration. The following groups could engage in this conversation simultaneously and provide a synergy to the generation of ideas that would no doubt be superior to the elementary components of this proposal. Some of these groups include:

1. Past national officers and leaders of CRLA and NADE
2. Current and past national leaders of CRLA and NADE (*e.g., committee, SPINs, SIGs*)
3. Chapter leaders of CRLA and NADE
4. ACDEA Fellows
5. Chairs of graduate degree programs related to learning assistance and developmental education
6. Representatives of the ACDEA
7. National education leaders (*e.g., John Gardner, John Rouché, Robert McCabe*)
8. Experts outside of learning assistance and developmental education (*e.g., U.S. Department of Education, Lumina Foundation, other national education centers or foundations*).

B. Create venues for these stakeholders to learn about the working papers (*such as this one*) and engage in conversation about the ideas:

1. Public forums at chapter and national conferences
2. Telephone conference calls for smaller groups
3. Small group meetings in conjunction with national conferences
4. Email listserv discussion group for anyone. This would be best served through a separate listserv from LRNASST which could be overburdened by the email traffic.

C. Learn more about the issues related to creation of a new professional association.

1. Conduct more research about other professional associations (e.g., organization, member services, use of full-time office staff, budget issues)
2. Learn how other associations have worked together to create a new organization to better serve the needs of current and new members
3. Gain expertise from other professional associations by purchasing an individual membership in the American Society of Association Executives. Purchase publications from ASAE on related topics and gain expertise through member-only services of the organization.

D. Provide for continuity of this process of investigating the merits and manifestation of a new professional association.

1. Charge the existing CRLA/NADE Working Group to serve as a coordinating committee for this investigative process by the two national executive boards. Additional appointees might be selected by the two organizations to add more voices and include those with selected technical expertise (e.g., *budget*). The group would continue to report directly to the two national executive boards. Members of this steering committee would be available as requested via telephone or in-person for any national board meetings to present reports.
2. The CRLA and NADE national executive boards would meet together in conjunction with a national conference to discuss this investigative process, confirm continuing interest, and any other appropriate business.

E. Acquire and designate resources for investigating the merits of a new association.

1. Write a grant to fund research and meetings of stakeholder groups
2. Each national executive board create a budget for costs associated with this strategic planning process if external grants are not received.

F. If a decision is made by the CRLA and NADE national executive boards to conduct a vote of the national membership regarding creation of a new association, a number of steps should be taken:

1. More communications with current members at the chapter and national level about the merits of the proposed change (e.g., town hall meetings at chapter and national conferences, special email messages, special print mailing, web site).
2. Prior to creation of the language for the vote by the membership, legal counsel would be consulted on appropriate language that closes the current association, creates a new association, and transfers financial assets of the current association into the new one.

G. If the vote is affirmative for creation of a new professional association, the following steps could be helpful to successfully facilitate the process. This would be a multi-year process due to the complicated nature of the change and the fiscal commitment for future national conferences.

1. Create a timeline of critical events (e.g., *conference planning; creation of new constitution, by-laws, and operating procedures; budget transfers; and marketing efforts*). For example, the organization which has committed out further for national conferences would refrain from additional commitments. The other organization would commit until its final individual national conference occurred during the same year as the other organization. Both organizations would commit to one additional national conference which would be jointly sponsored.

2. Hold one or more joint symposiums among the groups to help people to meet others in the larger family. A joint national conference would be the final major event for both organizations.
3. The new organization would host the national conference during the fiscal year after the closing of the two organizations. Commitment and planning for that conference would occur years before the formal closing of the two associations.
4. Hold a constitutional convention to draft a new constitution, by-laws, and operating procedures. These would provide an infusion of new ideas as well as incorporating successful practices from CRLA and NADE.
5. Market the new organization before old ones end. The first audience is the present members at the national and chapter level. The secondary groups are those identified earlier in this report that have potential interest in this new and more inclusive organization.
6. Special consideration should be placed with the chapters of both associations. As semi-autonomous organizations affiliated with the national groups, their involvement with the change process is critical throughout the timeline. As some chapters already do, joint meetings among the CRLA and NADE chapters that represent similar geographical regions would be encouraged throughout the change process.

The previous timeline is simply for illustrative purposes of a possible scenario for change based on the recommendations of the CRLA and NADE Working Group. The road of change will be both long and difficult. But we believe that the journey will be fruitful for our current and new members.

Appendix 1

Profile of CRLA/NADE Working Group members

The following individuals were appointed by the national executive boards of CRLA and NADE to serve as the initial members of this working group. Many of these members hold membership in other related associations in addition to the organization that appointed them to this group. A short profile of their involvement in the field and contact information is provided for each.

David Arendale, Assistant Professor, College of Education and Human Development, University of Minnesota-Twin Cities, 262 Appleby Hall, 128 Pleasant Street SE, Minneapolis, MN. (612) 625-2928, arendale@umn.edu Arendale is a former chapter and national president of NADE. In 2000 Arendale was elected as a Fellow of the American Council of Developmental Education Associations.

Hilda Barrow, Chair, Developmental Studies, Pitt Community College, PO Drawer 7007, Greenville, NC 27835, (252) 493-7416, hbarrow@email.pittcc.edu. Barrow is a former national president of NADE.

Kathy Carpenter. Emeriti, University of Nebraska at Kearney. 3700 S. Westport Ave., #2804, Sioux Falls, SD 57106, (308) 440-7022, carpenterk@kearney.net Carpenter is a former national president of CRLA. In 2001 Carpenter was elected as Fellow of the American Council of Developmental Education Associations.

Russ Hodges. Associate Professor. Department of Educational Administration and Psychological Services, Texas State University at San Marcos, 601 University Drive, San Marcos, TX 78666-7933. (512) 245-7922, rh12@txstate.edu Hodges is a former national president of CRLA.

Jane McGrath. Emeriti, Paradise Valley Community College. 7501 E. Thompson peak Pkwy., #224, Scottsdale, AZ 85255, (480) 794-1610. jellenjay@aol.com In 2006 McGrath was elected as Fellow of the American council of Developmental Education Associations.

Pat Newell, Associate Dean, Edison College, 8099 College Parkway, Fort Myers, FL 33919. (239) 489-9262, pnewell@edison.edu Newell is a former national president of NADE.

Jan Norton. Director, Center for Academic Resources, University of Wisconsin Oshkosh. (920) 424-3419, nortonj@uwosh.edu. Norton is a certification reviewer for NADE, a former chapter president and SIG leader for CRLA, and the incoming president-elect for CRLA.

Appendix 2

Strategic analysis of a new professional association

One of the first tasks for the CRLA/NADE Working Group was to conduct a traditional strategic planning review of the potential for creating a new professional association. The selected process was a SWOT analysis. Following is a description of this process from Wikipedia http://en.wikipedia.org/wiki/SWOT_analysis

SWOT Analysis is a strategic planning tool used to evaluate the *Strengths*, *Weaknesses*, *Opportunities*, and *Threats* involved in a project or in a business venture. It involves specifying the objective of the business venture or project and identifying the internal and external factors that are favorable and unfavorable to achieving that objective. The technique is credited to Albert Humphrey, who led a research project at Stanford University in the 1960s and 1970s using data from the Fortune 500 companies. If SWOT analysis does not start with defining a desired end state or objective, it runs the risk of being useless. A SWOT analysis may be incorporated into the strategic planning model. An example of a strategic planning technique that incorporates an objective-driven SWOT analysis is SCAN analysis. Strategic Planning, including SWOT and SCAN analysis, has been the subject of much research. If a clear objective has been identified, SWOT analysis can be used to help in the pursuit of that objective. In this case, SWOTs are:

- **Strengths:** attributes of the organization that are helpful to achieving the objective.
- **Weaknesses:** attributes of the organization that are harmful to achieving the objective.
- **Opportunities:** *external* conditions that are helpful to achieving the objective.
- **Threats:** *external* conditions that are harmful to achieving the objective.

The internal factors may be viewed as strengths or weaknesses depending upon their impact on the organization's objectives. What may represent strengths with respect to one objective may be weaknesses for another objective. The factors may include all of the 4P's; as well as personnel, finance, manufacturing capabilities, and so on. The external factors may include macroeconomic matters, technological change, legislation, and socio-cultural changes, as well as changes in the marketplace or competitive position. The results are often presented in the form of a matrix.

Since this was a future-looking analysis, it was not possible to ascertain the “*strength*” of a new organization. Therefore, the analysis focused on the potential opportunities, internal weaknesses, and external threat to such an association. The items within each of these broad categories are not listed in priority order. An additional sort to the items was provided by categorizing them regarding their primary relationship or impact on individual members of the association, chapters within the new association, and items which impacted the entire association. Some items have impact in multiple dimensions, however they were placed in the category in which they had the most immediate impact.

Opportunity Strategic Analysis Table

| <i>Opportunities: What are the attributes of the new organization that are potentially helpful in achieving its objectives?</i> | <i>How can the potential strengths of such an organization be used to achieve its objectives?</i> |
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| <i>A. Primarily related to individual members</i> | |
| #A1. Individual members would not have to divide their time, money, and loyalty among competing organizations. Attending multiple conferences results in loss of time-on-task away from their jobs as well as additional expense which may not be covered by the institution. | A “one-stop” organization provides a more comprehensive set of services without the need to pay multiple membership fees and spend time attending multiple conferences to gain needed information. The Blue Ribbon Commission Report used an old saying in stating about bringing together the current organizations that serve this field by saying, “ <i>The whole is greater than the sum of the parts.</i> ” This new association would have the synergy and resources from the old organizations as a solid foundation to build a more inclusive place to serve more members, stakeholders, and students. |
| #A2. Through more inclusive vision, mission, and language, there is high potential for many more members from the traditional DE and LA-related areas to affiliate as well as others outside the traditional community (i.e., TRiO community, new student orientation directors, upper-level administrators). | There are several major sources of new members for the new organization: <ol style="list-style-type: none"> 1. It is estimated that more than 60,000 professionals work in the area of developmental education and learning assistance while probably much less than 10 percent are members of the current organizations that represent the field. Many members hold multiple memberships in the groups. 2. Cooperative marketing agreements might be negotiated with other related organizations to advertise the new organization and solicit membership. |
| #A3. Consider an expansion of the students that are ultimately served by the members of the new association. | <ol style="list-style-type: none"> 1. Conduct a review of other potential student groups that have academic achievement, persistence, and student outcome challenges in addition to the traditional group of academically-underprepared students. 2. Serve average students, upper division students, graduate or professional school students who have similar challenges as academically-underprepared students. 3. Expansion of the student focus would require a reconceptualization of a new association to meet their needs through the organization members. |

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| <p>#A4. New potential members could be recruited from inside and outside the institution that might have interest in the new organization.</p> | <ol style="list-style-type: none"> 1. New potential members could be recruited from other campus units: (a) TRIO administrators and teachers (UB, SSS, McNair); (b) First Year Experience administrators and teachers; (c) New student orientation program administrators and student orientation leaders; (d) Tutors (college, high school, and community); (e) Learning centers; (f) Faculty members interested in teaching students from diverse backgrounds; (g) Distance learning associations and their members; (h) Enrollment management/student retention administrators; (h) Workplace learning skills instructors; (i) High school teachers; (j) Disability services administrators and staff; (k) Community educators; (l) Faculty development center coordinators; (m) Learning communities directors; (n) High school to college bridge program administrators; and (o) commercial vendors. 2. These efforts would require a well-organized and well-funded recruitment and retention for association members. Considerable expertise is available from the American Society of Association Executives (ASAE). |
| <p>#A5. Economic savings to the new group members since they would be official members of one organization rather than several groups to obtain the benefits that are available from each.</p> | <p>Members would save money and time by belonging to only one national organization and not paying dues or attending conferences of additional competing group.</p> |
| <p>#A6. Bring more expertise from outside of the new organization to meet needs of its members.</p> | <p>Establish a knowledge exchange cooperative to gain access to expertise for professional development from sources outside of the association. For example, develop formal relationships with the American Evaluation Association and the American Educational Research Association for expertise regarding assessment, evaluation, and research. This is different and much more complicated than the current activities of the Professional Liaisons committee.</p> <ol style="list-style-type: none"> 1. Obtain discounted subscription prices for relevant professional journals related to association professional development priorities. 2. Identify experts from outside organizations who could conduct training workshops related to association professional development priorities. These workshops could be conducted as a preconference at the annual national conference or a regional workshop associated |

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| | <p>with a chapter conference..</p> <ol style="list-style-type: none"> 3. Negotiate for access to training materials from outside organizations who related to association professional development priorities. 4. Recruit faculty members from the graduate programs related to the profession and other national experts to contribute narrated PowerPoint presentations on selected professional development topics. These presentations would be made available through the association web site. |
| #A7. Bring more expertise from outside of the new organization to meet needs of its growing group of graduate student members. | <p>Gain access to expertise for professional development of the graduate students from sources outside of the association.</p> <ol style="list-style-type: none"> 1. Develop formal relationships with graduate student organizations within the American Evaluation Association, American Educational Research Association, American College Personnel Association, National Association for Student Personnel Administrators, and others for expertise regarding mentorship and service to graduate students. 2. Obtain discounted subscription prices for relevant professional journals related to graduate student professional development. 3. Recruit faculty members from the relevant graduate programs and other national experts to contribute lectures delivered via emerging learning technologies on selected professional development topics. |
| #A8. Provide more professional development through a wider variety of venues through the increased economic resources of a larger organization and the combined expertise that was formerly dispersed among the separate previous organizations. | <p>Provide professional development opportunities through a wide variety of venues to reach current and potential association members.</p> <ol style="list-style-type: none"> 1. Reserve at least one concurrent and one preconference workshop sessions at every national conference for selected professional development topics as determined by a Professional Development Taskforce (e.g., certification, writing for publications). The annual conference would create a strand of professional development concurrent presentations if there are a sufficient number to justify its creation. 2. Require all conference concurrent session proposals to include a section on assessment data that provides evidence that supports the claims of the educational practice or activity to be presented. 3. A Professional Development Taskforce could create regional one- or two-day workshops on selected professional development topics. These workshops may |

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| | <p>be held in lieu of or in conjunction with association chapter conferences.</p> <ol style="list-style-type: none"> 4. Summer symposiums and national workshops could be scheduled throughout the year to complement on-line training venues. 5. The Professional Development Taskforce could be responsible for securing narrated PowerPoint presentations on selected professional development topics. They would be available through the association web site. 6. The Professional Development Taskforce could offer on-line workshops on selected professional development topics using distance learning course managements systems (e.g., Blackboard, Breeze. WebCT). These may be free to members or would be fee-based. 7. The Professional Development Taskforce could increase the quantity and quality of professional development resources available through the association web site. 8. Ensure that a wide variety of print publications are produced to meet the diverse needs of the membership. More detail about this item is contained elsewhere within this document. 9. Use emerging learning technologies to communicate with members. One example is the use of podcasting (internet radio shows) to provide a weekly interview show with experts within and outside the profession on important topics. Another emerging technology is to use virtual learning spaces such as Second Life (http://secondlife.com) to conduct meetings, workshops, and foster communication. 10. Continue to encourage use of the LRNASST internet discussion group as the official communication forum for the organization. |
| <p>#A9. Provide a wider variety of professional development topics for its members through the increased economic resources of a larger organization and the combined expertise that was formerly dispersed among the separate previous organizations.</p> | <p>A. Conduct annual surveys of professional development needs of its members.</p> <p>B. Topic areas may include the following:</p> <ol style="list-style-type: none"> 1. Program evaluation 2. Program component certification 3. Writing for scholarly publications 4. Conducting research 5. Teaching students from culturally diverse backgrounds 6. Teaching students who are academically |

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| | <p>underprepared</p> <p>7. Academic support for distance learning students</p> <p>8. Research-based best practices in access programs, developmental education, and learning assistance.</p> <p>9. Research-based best practices in student retention</p> <p>10. Learning theories</p> <p>11. Enrollment management</p> <p>12. Serving students with disabilities.</p> |
| <p>#A10. Provide a wider variety of print publications for professional development and support of its members through the increased economic resources of a larger organization and the combined expertise that was formerly dispersed among the separate previous organizations.</p> | <p>Provide a wide variety of publications to meet the professional development needs of its members. A mix of print and PDF versions of the documents would be distributed. If the publication is available primarily through PDF format, print a limited quantity of the publications for the authors and for limited distribution by the Executive Board. This is an important incentive to attracting potential graduate student, tenure, and tenure-track authors who need their work to be formally printed for review purposes by the institution..</p> <ol style="list-style-type: none"> 1. National conference proceedings could be produced annually as a PDF monograph available through the national association website. Electronic copies of PowerPoint national conference presentations could be posted to the association web page. 2. National association newsletter could be produced periodically throughout the year and sent to all members as a PDF attachment to an email message and also made available through the national association web site. 3. Provide several publications as part of their basic membership benefit (some of these may change names based on changes with organizational structure and language usage: Journal of College Reading and Learning, Journal of Developmental Education, NADE Digest). 4. Some publications might require an additional fee (e.g., Annual Research Journal) for print or CD-ROM PDF copies or provided through the national association web site. A limited quantity would be printed for the authors and for limited distribution by the Executive Board. (This is an important incentive to attracting potential tenure and tenure-track authors). 5. Additional publications related to member interest at a discounted rate through cooperative agreements with other organizations (e.g., American Evaluation Association, American Educational Research |

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| | <p>Association, American Psychological Association).</p> <ol style="list-style-type: none"> 6. Periodically publish research reports and monographs on selected topics. These documents would be provided to all members as a PDF attachment and available through the national association web site. Print a limited quantity of the reports for the authors and for limited distribution by the Executive Board. Partnerships would be sought with the graduate programs and national centers associated with this field. 7. Create a new Best Practices Guide on new function areas associated with the field. This might include FYE programs, use of technology in programs, academic support for distance learning students. This publication would be published and marketed through a professional publishing house with profits reinvested within the association. 8. Create a primer on program evaluation. Provide a PDF copy to all individual members through an email attachment and provide through the national association web site. Print a limited quantity of the monograph for the authors and for limited distribution by the Executive Board. 9. Support revisions of previously published guidebooks of best practices, curriculum for tutor training, and steps to establishing learning centers. 10. Provide a directory of programs that have received certification through the association. |
| #A11. Create new membership categories in the organization and differing levels of service accordingly. | <p>Different membership categories could have different fee levels and corresponding levels of access, resources, publications, and services.</p> <ol style="list-style-type: none"> 1. Discounted memberships for graduate students, adjunct faculty members, and retired educators; 2. "Regular" membership could require employment as an educator. 3. Annual membership fee could be based on income level category; 4. Create a new membership category for commercial vendors that could be for either individual employees or a group membership for the firm. 5. Carefully consider the economic impact of institutional membership. |
| #A12. Provide a unique service to its members by hosting an on-line library of | <p>This virtual library would be hosted by the organization through its web site. Decisions and activities with establishing this library could encompass:</p> |

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| campus student retention plans. This would be of high interest to upper-level administrators at an institution an inducement for membership and service to enrollment management members. | <ol style="list-style-type: none"> 1. Access could be open to the general public as a public service and indirect inducement for membership or restricted to paid members. 2. Decision to partner with other professional associations that have a mutual interest in this library: National Association of Student Personnel Administrators, National Academic Advising Association, etc. 3. Invitation sent to colleges to submit their student retention plans as a PDF document through the web site. 4. Invitation sent to the annual award winners of the Noel-Levitz competition for student persistence efforts. |
| #A13. Provide a unique service to its members by hosting a center that identifies, validates, and disseminates best practices for retention of historically-underrepresented students. | <p>External funds would be needed to initially fund a research center to conduct this work and public the findings. This would be similar to the What Works Clearinghouse http://www.whatworks.ed.gov/</p> <ol style="list-style-type: none"> 1. Search for potential funders and submit proposal 2. Establish Blue Ribbon Advisory Council 3. Create criteria for the identification, validation, and dissemination of best practices related to the profession. 4. Disseminate information through a web site and use of emerging technologies. |
| #A14. Increase involvement and use by upper-level campus administrators of the organization. | <p>Provide special privileges and services for upper-level campus administrators at the vice-president, provost, or president level.</p> <ol style="list-style-type: none"> 1. Free conference registration if accompanying other paid registrants from the campus (i.e., FYE Conference) 2. New organization hosts an on-line library of student retention plans from colleges across the U.S. |
| #A15. Build upon the strength of current graduate students and graduate programs related to developmental education and learning assistance in a manner that both supports the new group and the needs of these students and programs. Graduate students are the future leaders of this profession. In most professional associations, considerable resources are expended to mentor, recruit, | <p>Cultivate, develop, and recruit the involvement of graduate students who are the future leaders of this profession and professional organization. The following recommendations are based on common practices at other major national professional associations such as the American Psychological Association.</p> <ol style="list-style-type: none"> 1. Create a taskforce on graduate students that reports directly to the national executive board. The taskforce creates and revises annually a strategic plan and make recommendations to the Executive Board regarding policies and plans regarding graduate student professional development and recruitment efforts. The taskforce conducts an annual survey of graduate student association members at both the national and state level to guide programming and planning decisions. Solicit |

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| <p>support, and develop this future talent, While providing discounted conference registrations are appreciated, considerable programming is required for these graduate students to receive the support and service that they require.</p> | <p>leadership for the taskforce from association members who are members of one of the following groups: ACDEA Fellows, Emeritus Council and other past national officers, leaders of other national organizations, faculty advisors, and faculty members who teach in the developmental education graduate programs. Taskforce chaired by a faculty member with graduate school advising experience.</p> <ol style="list-style-type: none"> 2. Design a special recruitment plan for the graduate students and graduate program faculty members. Create a customized membership brochure customized to appeal to both of these potential members. 3. Provide a wide array of services to meet the needs and involve graduate students with the association. (a) Provide a separate orientation social for graduate students on the first day of the conference led by the Graduate Student Taskforce chairperson and other national leaders of the association; (b) Provide recognition of graduate students who attend conferences; (c) A graduate student newsletter is produced semi-annually and sent to all graduate students members as a PDF attachment to an email message and also made available through the national association web site. Content for the newsletter is produced through a collaboration of the faculty mentors and the graduate students. Selected items from the graduate newsletter are submitted to the national association newsletter; (d) A Graduate Student affinity group is created for both graduate students and the faculty members who work with and have interest in them. To provide continuity for the group, a faculty member and a graduate student serve as co-chairs. The group operates as an advisory group for all graduate student-related activities. The affinity group session during the national conference serves as a venue for mentors and graduate students to have informal interactions which more formal ones occur during the concurrent conference sessions and other activities described elsewhere within this document; (e) At the national conference, offer a “fireside chat” session open only to graduate students. A special guest recruited by the Taskforce on Graduate Students would provide a guided discussion session. (f) At the national conference, offer a complimentary one-day preconference orientation and professional development |
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| | <p>workshop for graduate students. To help underwrite the additional cost of the event, the national association reimburses the cost of one night's lodging at the conference hotel; (g) At the national conference, offer several special concurrent conference sessions open only to graduate students. The topics for these sessions would be determined by the Taskforce for Graduate Students.</p> <p>4. Recruit graduate students to write for association publications. The Publications Committee provides at each national conference a concurrent session that encourages and trains participants concerning the requirements and opportunities regarding the different association publications. The Publications Committee semi-annually solicits manuscripts from the graduate programs in developmental education and other relevant graduate programs that may have faculty and students interested in writing for association publications. Publish an annual research monograph to provide a venue for publication of emerging research conducted by graduate students as part of their formal coursework and personal research activities as well as a venue by other members of the association. The existing Publications Committee would manage this publication. Provide a PDF copy to all individual members through an email attachment and provide through the national association web site.</p> |
| #A16. The members have more support through a respected global association that through its larger size and more services. | <ol style="list-style-type: none"> 1. Journals, publications, and research integrate best practices from around the world. 2. The association supports growth of chapters outside the U.S. to increase interactions among all members regarding best practices. 3. Act as a global leader and seek strategic partnerships from around the world. 4. Host some meetings of the association outside the U.S. periodically. 5. Include global leaders as keynote speakers at association conferences and workshops. 6. The association issues more position papers, professional standards, and is more involved in general postsecondary education issues that are recognized by campus, state, and national policymakers. |
| #A17. A larger organization with increased revenue can | <ol style="list-style-type: none"> 1. Increase the number and size of financial awards and scholarships to members and students served by the |

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| provide more awards and scholarships for its members and students served by the field | <p>field.</p> <ol style="list-style-type: none"> 2. Attract more funds to the association foundation to support more awards and scholarships. 3. Provide opportunities for members to use estate planning to donate a portion to the scholarship foundation of the association. |
| <i>B. Primarily related to association chapters</i> | |
| #B1. Both CRLA and NADE have strong chapter organizations that could continue with the new association. | <ol style="list-style-type: none"> 1. Closely involve chapter leaders and members in the conversation regarding a new professional association and seek their support and innovative ideas. 2. Chapter members are a prime group to recruit for the new association since some (<i>or many</i>) do not hold membership in both the chapter and national organizations or CRLA or NADE. 3. The new association provides even more resources and support for the chapters than are currently provided by the existing organizations. |
| #B2. Many CRLA and NADE chapters already are hosting joint annual meetings and conferences. They provide inspiration for the possibilities of a larger organization composed of members from CRLA, NADE, and other groups. | <ol style="list-style-type: none"> 1. CRLA and NADE encourage its chapters to continue holding periodic or annual joint conferences. 2. Chapters who have not experimented with jointly hosting meetings are encouraged to seek out other chapters for joint conferences to meet new people, build relationships, and serve as a model for CRLA and NADE as they explore creation of a new professional association. |
| <i>C. Primarily related to the entire association</i> | |
| #C1. Opportunity for the field to reinvent itself through a new and expanded vision, mission, and language fueled by the synergy created by bringing together the energy and expertise of CRLA, NADE, and other groups. | <p>Conduct comprehensive and inclusive process for the existing organizations to create a new one that can better meet needs of the professionals and the stakeholders served.</p> <ol style="list-style-type: none"> 1. Involve current individual members, chapter leaders, and national leaders from the organizations interested in the new group; 2. Invite national leaders from outside the current organizations for their expertise and perspective in creation of the new organization; 3. Conduct focus groups with people inside and outside of |

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| | <p>education who may be prime candidates for membership recruitment of the new organization;</p> <ol style="list-style-type: none"> 4. Conduct joint summer symposia of the organizations to foster conversation, 5. Employ impartial facilitators for meetings; and 6. Review the professional literature and contact leaders of other organizations regarding creation of a new group from previous existing organizations (i.e., American Society for Association Executives). |
| #C2. Present a unified image to the education community of one voice and one organization speaking on behalf of its members, students, and other stakeholders rather than the current array of half a dozen competing groups. | Create one new organization that unites the efforts of current and new stakeholders. In addition to being a central location for professional development of its members, the association would also be a “ <i>one-stop shop</i> ” for policymakers and stakeholders for consultation, information, policy statements, and resources. |
| #C4. Bring together and create synergy of energy, personnel, and resources from all the existing DE and LA-related groups to more effectively meet its new expanded vision, mission, and objectives. The whole would be greater than the sum of its parts. | With more financial resources, combined membership, and combined expertise of the previous discrete organizations, the new group could provide more expertise, resources, and services for current and new members (i.e., professional development, public policy advocacy), and external stakeholders (i.e., legislators, educational policy makers). |
| #C5. Provide a coherent, coordinated, and consistent set of global certification programs for the field (i.e., <i>tutoring, developmental-level courses</i>) to improve its practice and service to students. | Ensure that all certification programs employ similar: (a) standards of expectation, (b) training opportunities for those pursuing certification, (c) procedures for completion, (d) length of certification period, (e) similar fee structures, and (f) ensure no duplication. |
| #C6. Build more scholarly research for the field through the efforts of a new organization that attracts more graduate students and tenured or tenure-track | <p>Building the scholarship of the profession will require several strategies mentioned directly or indirectly in more detail elsewhere in this document. Several of them include:</p> <ol style="list-style-type: none"> 1. Special efforts to recruit graduate students in areas related to the profession; 2. Special efforts to recruit faculty members (tenure-track |

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| faculty members who conduct research and publish as a part of the job scope or graduate degree program. | <p>and tenured) who conduct scholarly research and publish as part of their normal workload;</p> <ol style="list-style-type: none"> 3. Providing encouragement and recognition to those who do scholarly research 4. Publishing an externally peer-reviewed research publication by the organization. |
| #C7. Work more intensely and for a longer time period with organizations that could support the new organization. These working relationships are more substantial than those established through liaison relationships which would be continued from those established by the previous organizations. | <p>Begin to actively work on a continual basis with other national organizations directly and indirectly related to this new group:</p> <ol style="list-style-type: none"> 1. National Resource Center for the First Year Experience and Students in Transition (http://www.sc.edu/fye/) 2. Policy Center for the First Year in College (http://www.firstyear.org/) 3. Council on Opportunity in Education (http://www.coenet.us/) 4. Association for the Study of Higher Education (http://www.ashe.ws/) 5. American Educational Research Association (http://www.aera.net/) 6. League for Innovation in the Community College (http://www.league.org/index.cfm) <p>Continue current collaborations</p> <ol style="list-style-type: none"> 1. Council for the Advancement of Standards 2. European Access Network |
| #C8. Join global and national coalitions that are working on broad education issues | <p>The new organization would join efforts to further education issues outside of its traditional interest areas as described in the previous opportunity item above.</p> <ol style="list-style-type: none"> 1. Federal financial aid for students; 2. Work force training; 3. P-16 education initiatives; 4. High school-to-college collaborations |
| #C9. Access the expertise of commercial vendors more effectively. | <p>Commercial vendors are an integral part of the profession and their presence at the national conference helps to encourage attendance at the event. Their expertise can be accessed in the new organization through the following:</p> <ol style="list-style-type: none"> 1. Provide a presentation strand at the national conference for commercial vendors to demonstrate their products and services either directly or indirectly. Acceptance for such presentations would be through a review process as are other presentations. 2. Create a permanent ad hoc commercial vendor advisory group. Composed of a rotating group of interested vendors, the group provides formal feedback to the organization regarding conference policies that impact |

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| | <p>them as well as provides a forum for helpful input to the organization on other issues.</p> <ol style="list-style-type: none"> 3. Assure consistent policies from year-to-year at the national conference regarding issues and policies that impact the commercial vendors. |
| <p>#C10. CRLA and NADE have a strong leadership group that volunteers their time and effort through: elected positions, appointed committees and taskforces, leading SIG and SPIN groups, presenting at conferences, conducting research, and writing scholarship publications and training materials.</p> | <ol style="list-style-type: none"> 1. More systematically involve current and former leaders at the chapter and association-level through formal advisory councils (<i>e.g., Past Officers Council, Blue Ribbon Panel, ACDEA Fellows, Leadership Congress, and Town Hall meetings</i>). 2. Provide administrative support for the volunteer leaders through the increased paid professional staff at the association home office. 3. Highly involve these leaders in the conversation about creating a new association and gain their active participation in the creation of the new organization. |
| <p>#C11 The annual association conference could feature more timely, prestigious, and global keynote speakers to inform and inspire the members.</p> | <ol style="list-style-type: none"> 1. Increase the budget for keynote speakers at the association conference. 2. Consider internationally-known and renowned educators and leaders who could inspire the conference participants. |
| <p>#C12. An expanded vision and mission for the association could attract more members from new categories.</p> | <p>As described elsewhere in this document, membership recruitment efforts could be directed to new member groups that do not already have strong representation relative to their size within postsecondary education (<i>e.g., graduate students, TRIO personnel</i>).</p> |

Weakness Strategic Analysis Table

| Weaknesses: <i>What are the attributes of the new organization that are potentially harmful to achieving its objectives?</i> | <i>How can each potential weakness of such an organization be reduced or eliminated?</i> |
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| A. <i>Primarily related to individual members</i> | |
| #A1. Perhaps offer less nationally-elected leadership positions with the new group in comparison to the cluster of current ones (<i>For example, one president rather than five.</i>) | Create more leadership positions due to its more comprehensive nature through more national and chapter elected positions, elected positions by affinity groups within the large organization, and appointments by the leadership group at the national and chapter level. |
| #A2. With creation of a larger and new organization, there is potential for previous members of other groups to be overwhelmed with the size and to not have a comfortable “ <i>place</i> ” to be an active and connected member. | Create new “ <i>learning spaces</i> ” both large and small for members to congregate, learn, and have a level of comfort. Affinity groups could be composed of : <ol style="list-style-type: none"> 1. institutional types (<i>i.e., public research universities, private liberal arts institutions, Historic Black Colleges and Universities</i>), 2. academic content areas (<i>i.e., ESL, reading, writing, science, mathematics</i>), 3. job function areas (<i>i.e., peer learning, developmental-level courses, learning centers, distance learning administrators</i>), 4. job functions (<i>i.e., academic advisors, administrators, classroom teachers</i>), 5. demographic groups (<i>i.e., graduate students, people of color</i>), 6. other areas (<i>i.e., evaluation and research, publications</i>) 7. major operating divisions of the new organization could be based on job function areas (<i>course instruction, peer learning programs, academic bridge programs, learning centers, enrollment management programs, and distance learning academic support</i>). |
| #A3. Potential loss of one or more of the national publications provided to the new membership (<i>i.e. Journal of College Reading and Learning, Journal of</i> | Members of the new organization could be provided all of the previously distributed national publications (<i>i.e., JCRL, JDE, NADE Digest</i>) as part of the new annual membership fee. A decision could be made regarding which publications are distributed through print and those through Acrobat PDF versions through e-mail attachment, organization web site |

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| <p><i>Developmental Education, NADE Digest).</i></p> | <p>download, or CD-ROM mailed to the members. Also, advertising could be added to publications that do not currently include them to help offset the distribution and publication costs.</p> |
| <p>#A4. Clash of perceptions of differences and value systems among the previous organizations and work to create the culture of the new organization. Some may feel a loss of the old history that they were deeply involved with building. Others might fear that the new association will more often reflect the largest of the previous organizations that form the new one.</p> | <p>The new organization would place careful attention upon the culture and environment of the new organization. Valuing old traditions and creating new ones will be a challenge.</p> <ol style="list-style-type: none"> 1. Selectively keep old ones by carefully merging with previous traditions of other associations. 2. Create new traditions to replace old ones not continued and give opportunity for the new organization to help create its own unique identity. 3. As described earlier in this document, create smaller “<i>learning spaces</i>” for previous members who came from smaller organizations. |
| <p>#A5. Potential to not effectively invite and involve prior elected and appointed leaders of the previous organizations.</p> | <p>Create environment and structure within the new organization for previous and current national leaders to be valued and have opportunities for leadership.</p> <ol style="list-style-type: none"> 1. Past Officers Council includes all previously-elected national executive board members of the old organizations and continuing with the new one. To help create a mission for this experienced leadership group, opportunities could include the following: (a) draft policy statements for review, revision, and enactment; (b) Consult with the annual review of the association strategic plan; (c) Other projects as created by the Emeritus Council and requested by the national executive board; (d) Participate as appropriate in the annual training program for new leaders; (e) Speak at chapter conferences as keynote speakers; and (f) Invite them to serve in a mentorship program of new organization members. 2. Annual Leadership Congress held in conjunction with the annual national conference brings together all elected and appointed national leaders and chapter presidents. 3. Chapter President Council is delegated similar opportunities for leadership and service as the Emeritus Council. A Past Officers Council at the chapter level might be formed as well. |

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| <p>#A6. Some people might be less likely to run for office due to the larger organization size.</p> | <p>Assure association leaders that the new association has several supports for them:</p> <ol style="list-style-type: none"> 1. More appointed and elected leaders will spread out responsibilities and provide support networks. 2. Provision of paid professional staff provides an administrative support team to deal with administrative and clerical duties formerly assumed by leaders and their institutional office staff. 3. Create more clear job descriptions and work scopes so that individuals could more clearly understand their responsibilities and available resources to support them. 4. Association provides reimbursement for all approved expenses related to leadership duties (<i>e.g., travel, telephone, printing</i>). The goal is that an individual from any type of institution could effectively serve without use of personal or local institutional funds to cover direct expenses. |
| <p>#A7. Some individuals or small groups may lobby against significant change due to various reasons and feelings (<i>e.g., perceived loss of traditions, language, organizational history, privileges, and personal bias against significant change of any kind</i>).</p> | <ol style="list-style-type: none"> 1. Provide many venues for conversation throughout the organizations at the chapter and national levels. 2. Create a website to disseminate information about the proposals for change. 3. Recognize that complete agreement is not possible within a democratic world. Differences of opinion are sometimes met through an open democratic voting process. Many important pieces of legislation and votes on the Supreme Court have occurred with a slight majority of the vote |
| <p>#A8. The conversation process for considering creation of a new professional association could be long and difficult to maintain with new chapter and national policy executive board members who were not involved with initial discussion or decision-making.</p> | <ol style="list-style-type: none"> 1. As described in the above item, provides numerous venues for conversation so that people have many opportunities to learn about and engage in the discussion. 2. Future elected policy executive board members agree to continue the conversation so that the widest group of people can participate, eventually through votes at the chapter and association level. |
| <p><i>B. Primarily related to association chapters</i></p> | |
| <p>#B1. Creation of the new organization is more</p> | <p>Considerable dialogue needs to occur among members and leaders of the organizations at the chapter and national level.</p> |

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| complicated since it involves change with the national organization as well as the independent chapters at the regional and state level. | There are already examples among CRLA and NADE chapters of cooperating on an occasional or regular basis (<i>i.e., Texas</i>) on collaborative efforts. |
| #B2. Regions of the U.S. have been organized differently by CRLA and NADE and may be difficult to reconfigure with a new association. | Chapters use the time before the new association becomes operational to experiment with joint chapter meetings with different configurations of states to discover which is most effective. With more potential members, strong state associations may emerge rather than multi-state regions based on the decisions by the emerging chapters. |
| #B3. Lack of formal involvement by chapter members and leaders could lead to lack of support for conversation and change by the association. | <ol style="list-style-type: none"> 1. As described earlier in this document, numerous communication channels need to be available so that both chapter members and leaders can be involved. 2. Formal input should be gathered from the chapter leaders through a Leadership Congress held in conjunction with the annual association conference. |
| <i>C. Primarily related to the entire association</i> | |
| #C1. Potential for complacency of the new group due to lack of competition among competing national organizations. | <p>Ensure that the national leadership is accountable to emerging needs and trends within the field through:</p> <ol style="list-style-type: none"> 1. aggressive strategic plan with time lines and benchmarks for performance 2. creation of a national advisory board of leaders from outside of the target membership to offer critical reviews and recommendations for action by the organization as well as other advisory groups (<i>e.g., former board officers, chapter leaders, ACDEA Fellows, and town hall meetings of general membership</i>). 3. annual surveys of the membership regarding needs. 4. Annual external audit of financial records |
| #C2. Potential for stagnant or slow membership group of the new organization. | <p>Create special taskforce to coordinate all efforts of recruitment and retention:</p> <ol style="list-style-type: none"> 1. Create a carefully coordinated and comprehensive membership recruitment and retention program. 2. Purchase publications from the American Society of Association Executives related to membership recruitment and retention. |
| #C3. Financial transition | Several steps could be taken by the new organization: |

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| <p>period between the old organizations and the new group presents uncertainty:</p> <ol style="list-style-type: none"> 1. With elimination of duplicate national memberships, the total membership renewal fees of the new organization may be initially lower than the previous amount collected by the previous groups. This could also be true for net revenue generated through the national conference. 2. Some members from the previous groups might not initially join the new organization. 3. Difficulty with predicting attendance at the national conference for negotiation of the associated hotel contract. | <ol style="list-style-type: none"> 1. Create recruitment and retention taskforce to create plan and put into action years before the actual closing of the previous organizations (<i>more details elsewhere in this document</i>); Not only focus on retaining current members, but also aggressively recruit new members from inside the traditional affinity groups within education as well as new ones. 2. Make a conservative estimate for the first annual conference hotel contract and negotiate supplemental housing options nearby to the main convention hotel; 3. Use part of the financial reserves of the new organization that were contributed by the previous organizations to cover operating expenses until new revenue is generated (<i>i.e., higher annual membership fees, higher annual conference net revenue, sales of products and services</i>). |
| <p>#C4. Potential insufficient infrastructure to support member programs and services.</p> | <p>Create operating divisions within the large organization on the basis of job function areas. Significant authority is delegated to these operating divisions to complete their work with a strong accountability system to the national executive board. Initially these divisions would vary in size and would require specialized recruitment efforts. Some of these divisions might include the following:</p> <ol style="list-style-type: none"> 1. course instruction (<i>i.e., faculty teaching remedial- or developmental-level courses, faculty teaching students who are academically-underprepared in college-level core curriculum courses</i>) 2. peer learning groups (<i>i.e., tutoring, peer cooperative learning groups like SI or Peer-led Team Learning</i>) 3. academic bridge programs (<i>i.e., pre-collegiate summer academic bridge programs, new student orientation programs</i>) 4. learning centers (<i>i.e., learning assistance and</i> |

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| | <p><i>enrichment for students, teaching/learning centers that host both faculty development services and student academic support)</i></p> <ol style="list-style-type: none"> 5. enrollment management programs 6. distance learner academic support (<i>i.e., on-line academic support such as tutoring and writing assignment review</i>) |
| <p>#C5. Administration of a larger more comprehensive and complex organization may exceed the ability of a nearly all-volunteer staff.</p> | <p>To support new programs and increased services to members, full-time professional staff would be employed to:</p> <ol style="list-style-type: none"> 1. Provide increased day-to-day service to individual members and the association. 2. Provide continuity from year-to-year with changing elected and appointed national and chapter leaders. This staff would also provide training of new leaders. 3. Assist the national executive board and other assigned members with task support. 4. Maintain database of membership and on-line national conference registration. 5. Conduct recruitment and retention efforts for members. 6. Assist with drafting grant applications on behalf of the organization to attract external funds for new projects and services. 7. Financial duties normally associated with the nationally-elected treasurer would remain with that position. 8. Conference management and contract negotiation could be outsourced to an experienced commercial company with extensive experience. 9. Consider expansion of some administrative support from the association central office to the chapters and their leaders. |
| <p>#C6. Adding new paid staff before additional membership and conference revenue is generated places strain upon the new organization.</p> | <p>The addition of staff would require careful decisions since there may be a delay between the addition of paid-staff (<i>part-time or full-time</i>) and additional revenue generated through increased membership due to marketing efforts and more available services to individual members. This may require use of organization funds to cover additional costs until the new revenue is generated.</p> |
| <p>#C7. The cost and energy of change for creating a new professional association is enormous.</p> | <p>The case for change must be compelling for most members and leaders of the organizations that wish to work together in forming a new professional association. Careful attention to previously cited items for involving past and current members and leaders of the organizations will be critical for change and success.</p> |

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| <p>#C8. Lack of understanding of what is needed to create and operate a larger organization until it is too late in the creation process.</p> | <ol style="list-style-type: none"> 1. Create a timeline that provides sufficient time for an inclusive conversation with many groups: individual members of existing organizations; past, present, and future leaders of the existing organizations; individuals knowledgeable about organization change both in and outside the existing organizations; national leaders in the field and within postsecondary education in general; and individuals who are strong proponents for and against change. 2. Gain expertise from national organizations who have expertise with change (<i>e.g., American Society of Association Executives</i>). |
| <p>#C9. Creation of a new association and transfer of financial assets from the old organization is complicated and generates potential legal issues</p> | <ol style="list-style-type: none"> 1. Consult with experts in the field regarding such issues (<i>e.g., American Society of Association Executives</i>). 2. Hire legal counsel with expertise in non-profit organizations 3. Hire additional assistance from a Certified Public Accountant 4. Continue practice of annual audits by a CPA. |

Threat Strategic Analysis Table

| Threats: <i>What are the external conditions that are potentially harmful to the new organization in achieving its objectives?</i> | <i>How can the potential threat be defended against or eliminated?</i> |
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| <i>A. Primarily related to individual members</i> | |
| <p>#A1. The Federal Government has an indirect and direct negative impact upon the profession as a whole and the new organization in particular:</p> <ol style="list-style-type: none"> 1. The federal government still refers to developmental-level courses and services as “remedial.” 2. Standards for research studies 3. Considerations regarding certification issues of individuals and programs. 4. Federal regulations regarding Pell Grant use for developmental-level courses. | <p>New organization establishes a commission to work with the U.S. Department of Education concerning</p> <ol style="list-style-type: none"> 1. coherent national policy concerning access education, developmental education, and learning assistance; 2. terminology of the field; 3. use of federal financial aid for enrollment in developmental-level courses; 4. certification issues, research design for campus, state, and national studies; and 5. other issues. |
| <p>#A2. Roles of campus learning assistance professionals are expanded beyond their job skill preparation for some beyond their formal and informal job preparation through addition of new responsibilities:</p> <ol style="list-style-type: none"> 1. Increased responsibilities for students with disabilities 2. Mandated support for on-line distance | <p>The new organization could choose one or more of the following as responses:</p> <ol style="list-style-type: none"> 1. issues a series of position statements dealing with these issues; 2. Offer professional development to help members acquire the skills and confidence for these new roles. |

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| <p>learning courses</p> <p>3. Involvement with campus enrollment management tasks</p> | |
| <p>#A3. Some states are limiting or eliminating the offering of developmental-level courses and services.</p> <ol style="list-style-type: none"> 1. Shift of developmental-level courses from research universities and other public 4-yr institutions indirectly discourages research and publication in this area by faculty who perceive stigma associated with the field as well as a loss of campus courses and programs that could be studied.. 2. Some 4-yr institutions require students to complete necessary coursework at 2-yr institution and eliminate staff positions at the institution as a result. 3. Some public 2-yr institutions require students who test very low on college placement exams to complete the necessary academic preparation at local community Adult Basic Education Center and eliminate staff positions at the institution as a result. | <ol style="list-style-type: none"> 1. The new organization increases efforts regarding advocacy at the local, state, and national level. Several methods include: <ol style="list-style-type: none"> 1. Associate with new national partners to build credibility, raise national visibility, learn effective advocacy methods, and gain supporters. 2. Higher profile by the national organization (i.e., position statements, press releases, press conferences, national research reports of effectiveness of programs) 3. Training of individual members to advocate on issues at the local and state level. 4. Increased advocacy for related public issues by the new organization at the state and national level: press releases, press conferences, position statements, national research studies, expert testimony before legislative and educational policy groups 2. Conduct more research and provide evidence-based findings that support that developmental-level courses and services increase academic achievement, student persistence, and student outcomes in a cost-effective manner. All of these are significant issues for policymakers. |
| <p>#A4. Some commercial</p> | <p>Invite commercial companies to become members of the new</p> |

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| companies are contracting with an increasing number of postsecondary institutions to outsource or supplement their tutoring programs. | organization through the commercial membership category. This provides opportunity for dialogue that may be helpful for the field. |
| #A5. Increased accountability pressures to demonstrate improved student outcomes with threat of program elimination and staff layoffs. | The new organization, working with other national research centers, graduate degree programs, and state/federal agencies could do the following: <ol style="list-style-type: none"> 1. Help conduct regular national studies that meet national standards for rigor 2. Collect data for a national database for use in research studies. |
| #A6. Regional education accrediting agencies have inconsistent or nonexistent policies regarding this profession. | New organization establishes a commission to work with each of the regional education accrediting agencies regarding issues related to the profession. |
| #A7. Perception that there is little need for learning assistance due to higher exit skill levels of high school graduates. | New organization establishes a commission to work with private and public agencies or commissions that are related to high school-college transition issues. |
| <i>B. Primarily related to association chapters</i> | |
| #B1. Other professional associations may establish competing chapters within the same geographic area. | Just as with the national association, the new chapters provide a variety of services for different areas of the profession. The new association provides considerable support and resources to the chapter to help it flourish regardless of the competition. |
| <i>C. Primarily related to the entire association</i> | |
| #C1. The new organization would not have the immediate name recognition of the current group of professional associations. | Extensive advertising and promotion campaign are needed to communicate about the new organization and its relation to the old ones. It would be helpful to have some nationally-known and respected leaders from developmental education and learning assistance actively endorse and promote the new association. |
| #C2. Possible lack of public endorsement for the new | Public statements endorsing the new organization could be gained from: |

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| organization. | <ol style="list-style-type: none"> 1. National executive boards from the old organizations endorsing the new group and encouraging its members to join the new group. 2. Endorsements from other national organizations. 3. Endorsements from national leaders inside and outside the profession. 4. Endorsement by national leaders who are members of a Blue Ribbon advisory board to the new organization. |
| #C3. Change process could be delayed for years or derailed waiting for ACDEA to propose and enact changes to improve the professional associations in the field. | <ol style="list-style-type: none"> 1. CRLA and NADE focus its efforts and energy on issues that it can control and not on areas that require the agreement and sustained support of all other professional associations within an umbrella group like ACDEA. 2. The change process for creating a new professional association might be aided if the ACDEA or other groups simultaneously sought to answer whether increased efforts of coordination or collaboration would be sufficient to provide the increased member services as proposed by creation of a new professional association. The Blue Ribbon Commission Report identified three potential paths for the future: coordination, collaboration, and creation. |
| #C4. Public support for the new organization and the profession as a whole is mixed due to different perceptions, stereotypes, and levels of stigma attached to it. | Select a new name, mission, and key descriptive language about the new organization that would be appealing to a wider group of potential members and stakeholders. |
| #C5. Existing or new organizations may compete with the new association due to perceived unmet needs or unwilling to join efforts to create a united group. | Create a new organizational structure that will attract current and potential members to the new group and lessen the potential for creation of more competing national organizations (<i>i.e., academic support for distance learning programs</i>). |
| #C6. A splinter group of a minority of members of the current organizations might seek to create a small rival organization. | As described throughout this analysis, a wide and open conversation of the issue of creating a new professional association will serve all parties to the discussion. As cited earlier in this report, a basic law of physics is that “ <i>where there is movement, there is always friction.</i> ” No matter the discussion, logic, or evidence, some people will not want change. The democratic process works best when there is |

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| | <p>tension, disagreement, and challenges to proposed decisions. The “<i>marketplace of ideas</i>” is a place where all ideas are considered according to their merits and the most appropriate courses of action are selected. The central question must always be “<i>is it good for the members?</i>” In this case, the focus is on the majority of the members, especially the rank-and-file members. The democratic process recognizes that not all will agree with a decision, but that the public good must be the focus.</p> |
| <p>#C7. Institution may be reluctant to provide release time for an individual to serve on national executive policy board due to the loss of time away from office duties or the classroom to attend conferences, meetings, or other events.</p> | <ol style="list-style-type: none"> 1. Increase visibility of the institution’s “<i>sponsorship</i>” of the leader through recognition through the association web site, publications, conference announcements, and other means. 2. Assure institution that all direct costs associated with participating in official association dues are reimbursed. 3. Consider an annual administration support donation to the institution to recognize the work performed by others for the elected association leader. The amount would be limited to a small amount, such as \$1,000. |

Appendix 3

Lessons from other organizations

The following professional associations were investigated to identify potential design elements to consider in the construction of a new professional association. Most of the research was conducted by consulting the association's web site and doing a Google search for relevant information. A list of best practices from these associations that were common to multiple groups was listed earlier in this report. It is recommended that follow-up telephone calls be conducted with elected national leaders and members of the association home office staff to gain more in-depth information. Specific questions that could be utilized in this follow-up research are contained in a later appendix in this document.

1. American Counseling Association (ACA)
2. American Educational Research Association (AERA)
3. American Library Association (ALA)
4. American Mathematical Association of Two-Year Colleges (AMATYC)
5. American Psychological Association (APA)
6. Association for the Tutoring Profession (ATP)
7. College Reading and Learning Association (CRLA)
8. International Reading Association (IRA)
9. National Academic Advising Association (NACADA)
10. National Association for Developmental Education (NADE)
11. National College Learning Center Association (NCLCA)
12. National Council of Teachers of English (NCTE)
13. National Orientation Directors Association (NODA)
14. National Tutoring Association (NTA)

Best Practices of Other Organizations

Before the CRLA/NADE Working Group met, each member selected one or more professional associations listed above to investigate regarding their organizational structure, history of operation, and service to members. Abstracts of those investigations for each organization follows. The following best practices that were commonly shared among many of the groups that were investigated. These practices provided models for the recommendations concerning a new professional association described earlier in this report.

1. "*Knowledge communities*" are a central focus and service to members. Rather than just a special interest group of people with common interests, these communities are depositories and generators of scholarship and information that members use in their positions.
2. A box containing the "*association members*" is placed at the top of the organization chart. The organization provides various venues for direct input and decision-making by the association members.
3. The organization is subdivided into smaller operating units based on job responsibility areas, academic content areas, geographic area in the U.S., or other unit. Each of these units has direct representation on the Executive Policy Board. In addition to these functional areas are affinity social groups that provide networking among colleagues of similar interests.

4. Executive Policy Boards often have more members than CRLA and NADE due to increased complexity and more services to association members. Through clear differentiation of responsibilities, some organizations only require the entire association board to meet face-to-face several times annually while a smaller group meet for multi-day meetings. Monthly telephone conference calls are also used.
5. Checks and balances for the association are provided through an organization system that requires formal consideration of input and leadership congresses that allow for legislation to be proposed by groups outside of the smaller Executive Policy Board. Along with increased delegation of responsibility within the association, so is representation increased for decision making.
6. Membership fees for the association are differentiated on some basis (*e.g., full-time, part-time, retired, graduate student, income level*). Often these different types of membership have different services or publications provided to the member based on their membership category.
7. “*General membership*” in the association is restricted to those employed in the profession. Only these individuals have voting privileges and qualification to be elected to association-wide positions. A “*supporting membership*” category is reserved for corporate partners and commercial vendors of products and services used by the general membership.
8. Emphasis on serving graduate students and new members of the profession. Decreased membership costs provided sometimes for these categories.
9. Candidates for office on the Executive Policy Board must have served at least one year on an association-wide elected governing board. This was done to provide needed experience for leadership on the executive board.
10. Chapters at the state or regional level are provided for members. Membership is often required in the national association for those at the chapter level. Sometimes the chapter membership is provided free as a service funded through the association-wide membership fee.
11. The association has a permanent home office with one or more full-time professional staff that serve by the board by completing administrative tasks and increased service to the membership through enhanced benefits.
12. The association web site has extensive and rich content for service to its members and information for the general public. Some content is available to all and other is for members-only.
13. Conferences and workshops are provided in a variety of venues at different levels of the association in addition to a comprehensive national conference. Many of the associations provide annual regional conferences and on-line webinars on high-demand professional development topics. These are essential for members who cannot afford the expense or time away from the office to attend association-wide, face-to-face conferences.
14. Special emphasis is placed on delivering professional development to members through use of emerging technologies (*e.g., course delivery systems such as Blackboard, on-line conferences, podcasting, webinars*). Selected sessions from the association-wide conference are recorded and placed on the association web site for viewing by members.
15. Multiple publications and training materials are provided for the members at varying levels (*e.g., practitioner, theoretical, research*). One or more publications are provided to all members with others at additional cost. Some publications may be produced by the central

organization and others may be produced by the chapters or functional units of the association (*e.g., reading journal*).

16. A foundation is established to support the association by accepting large corporate gifts and bequests by individual members from their estates or irrevocable trusts.
17. The organization generates annual income through a wide variety of revenue sources (*e.g., annual conference revenue, periodic training workshops and on-line webinars on professional development topics, individual and institutional membership fees, corporate gifts, interest generated by operating and foundation accounts, corporate sponsorships, gifts and bequests by corporations and individuals, sales of materials and services, residual income from direct mail campaigns of individual members by insurance and credit card companies*).
18. Organization is heavily involved in sharing information and influencing public opinion about important issues in postsecondary education or a general nature and those closely associated with its members. Many organizations are parts of broad advocacy coalitions that advocate for opportunity in higher education (*e.g., increased financial aid, expansion of TRiO programs, reauthorization of the federal Higher Education Act*). These organizations often issue position papers, press releases, hold press conferences, provide speakers for media interviews.
19. Responsibility is carefully and deliberately distributed throughout the organization. There are multiple of coordinated councils operating at the association-wide level to provide leadership and conduct business on behalf of its members. A strong committee system provides balanced responsibility for completing essential tasks and serving member needs.
20. Continuity for association leadership is supported by placing the previous president on the new board (*ex officio or voting*) and a formal advisory group of former association-wide Executive Policy Board officers.
21. External conference management and planning companies are subcontracted to assist the association with the annual conference (*e.g., site selection, hotel and conference center contract negotiation, liaison support with conference venue, assistance with management and daily review of the hotel and conference center contract expenses*).
22. Professional associations directly sponsor and manage research centers that collect national data, maintain an accessible database for use by center staff and others, conduct research, and seek external funds for special projects. The centers produces and disseminates scholarship through a variety of means (*e.g., research papers disseminated through the association web site, scholarly manuscripts published in journals, provides technical assistance to members regarding information requests*).
23. Formal structure in the organization for serve as advisory group to the association-wide elected Executive Policy Board members. There may be one or more advisory groups (*e.g., former association-wide officers, external Blue Ribbon Panel of experts in the particular field or postsecondary education in general, commercial vendors who provide curriculum materials and educational services*).
24. Engage in long-term collaborations with other professional associations and coalitions on issues of direct or indirect impact on the organization (*e.g., support for reauthorization of the Higher Education Act, increased financial aid for students, and support for TRiO programs*).
25. Statements of the association's values are prominently displayed on the association web site.

Appendix 4

Comparison of the ACDEA affiliated organizations

Examining the current five associations that are affiliated with the American Council of Developmental Education Associations, they were compared and contrasted regarding their national committees, affinity/special interest groups, and geographic locations of their affiliated chapters at the state or regional basis.

Examining this structure, especially when similar elements are repeated over multiple organizations, provides important considerations when creating a new professional association.

| CRLA | NADE |
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| | |
| Texas | Texas |
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| Arizona | These states are combined in SWADE along with Wyoming |
| California | |
| Nevada | |
| New Mexico | |
| Utah | |
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| Alaska | Inactive |
| Hawaii | Part of new Pacific Rim chapter |

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| NORTHEAST: Connecticut, Maine, Massachusetts, New Hampshire, New York, Rhode Island, Vermont | New York |
| | LAANE: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont |
| | |
| Pennsylvania & New Jersey | Pennsylvania |
| | New Jersey |
| | |
| MID-ATLANTIC: DC, Delaware, Maryland, Virginia, West Virginia | No chapter in DC or Delaware |
| | Maryland |
| | Virginia |
| | West Virginia |
| | |
| SOUTHEAST: Florida, Georgia, South Carolina | Florida |
| | Georgia |
| | South Carolina |
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| MID-SOUTH: Alabama, Mississippi, North Carolina, Tennessee | Alabama |
| | Mississippi |
| | North Carolina |
| | Tennessee |
| | |
| OHIO RIVER VALLEY: Indiana, Kentucky, Ohio | Indiana |
| | Kentucky |
| | Ohio |
| | |
| CRLA | NADE |
| | |
| GREAT LAKES: Illinois, Michigan, Wisconsin | Illinois is a state chapter plus southern part affiliated with MRADE chapter |
| | Michigan |
| | Wisconsin isn't listed on the NADE website as a state. |
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| Minnesota, North Dakota, & South Dakota | Minnesota |
| | North Dakota inactive |

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| | South Dakota inactive |
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| HEARTLAND: Iowa, Kansas, Missouri, Nebraska, Oklahoma | Iowa |
| | MRADE: Kansas, Missouri, Nebraska, and southern part of Illinois |
| | Oklahoma |
| | |
| Arkansas & Louisiana | Arkansas |
| | Louisiana |
| | |
| Colorado & Wyoming | Colorado |
| | Wyoming is part of SWADE |
| | |
| NORTHWEST: Idaho, Montana, Oregon, Washington | NWADE: Idaho, Oregon, Washington |
| | Montana inactive |
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| <p>Comparison of the Five Major Professional Organizations Serving the Profession.</p> <p><i>Information may be incomplete or dated since it was drawn from association web sites.</i></p> | | | | |
| NADE | CRLA | NTA | NCLCA | ATP |
| Special Interest Groups (i.e., Special Professional Interest Networks, Special Interest Groups) | | | | |
| Adjunct Faculty | | | | |
| Administration | | | | |
| | Brain Compatible Teaching/Learning | | | |
| Counseling | Counseling and Helping Relationships | | | |
| Cultural Diversity | Multicultural Issues | | | |
| English/Writing/ESL | <ol style="list-style-type: none"> 1. Developmental/Basic Writing 2. English as a Second/Foreign Language | | | |
| | Freshman Year Experience | | | |
| Integration of Basic Skills in the Core Curriculum/General Education | | | | |

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|---------------------------------|---|--|------------|------------|
| | Learning Assistance Center Management | | | |
| Learning and Study Skills | Learning and Study Strategies | | | |
| Learning Disabilities | Learning Disabilities | | | |
| Mathematics | Mathematics | | | |
| Online Educator | Technology and Distance Learning | | | |
| | Paired Courses (<i>Learning Communities</i>) | | | |
| Peer Assistance Learning Groups | Peer Tutoring | | | |
| Private Liberal Arts | Liberal Arts Colleges and Universities | | | |
| Reading | College Reading | | | |
| | Research and Evaluation | | | |
| Technology | Technology and Distance Learning | | | |
| TRIO | | | | |
| Workforce Development | Workforce Literacy | | | |
| Ad Hoc Task Forces | | | | |
| Articulation (P-16) | | | | |
| Graduate Students | | | | |
| Committees | | | | |
| Adjunct Faculty | | | | |
| Annual Conference; Exhibits | Conference (<i>Multiple committees</i>) | | Conference | Conference |

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|---------------------------------------|----------------------------------|------------------------------|--------------------------|------------------------------|
| Archives | Archivist | | | |
| Awards | Awards and Scholarships | Awards | | Awards |
| Chapter Development | State and Chapters | | | Chapters |
| Constitution | | Constitution | | Constitution |
| Cultural Diversity | | Diversity | | Diversity |
| | | Distance Learning | | Distance Learning |
| Elections | Elections | | Nominations | Elections |
| | | | Finance | |
| International Access | | | | |
| | | Hospitality | | |
| Marketing (Ad Hoc) | | | | |
| Membership | Member Services | | Membership | Membershi p |
| Placement | | | | |
| Political Liaison | Political Action | | | |
| | | Private Practice | | |
| Professional Development | Professional Development | Professional Developme nt | Professional Development | Professional Developme nt |
| Professional Liaison | Professional Association Liaison | | | |
| Professional Standards and Evaluation | | | | Standards and Ethics |
| | | | | Public Relations |

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|--|--|---------------|-----------------|---------------|
| 1. Publications 2. <i>NADE Digest</i> (Ad Hoc) 3. Newsletter | 1. Media Advisory Board 2. <i>Journal of College Reading and Learning</i> | Newsletter | Newsletter | Publications |
| Research | | Research | | |
| Web Page | Web Site | | | |
| Councils | | | | |
| ACDEA (<i>provide representative</i>) | ACDEA (<i>provide representative</i>) | | | |
| Certification Council | 4. International Mentor Program 5. International Tutor Program | Certification | Certification | Certification |
| Council for the Advancement of Standards (<i>provide representative</i>) | Council for the Advancement of Standards (<i>provide representative</i>) | | | |
| Emeritus Council | Past Officers Council | | Past Presidents | |

Appendix 5

Additional Questions to Investigate

An earlier appendix in this report provided short profiles of several professional associations representing various segments of U.S. postsecondary education. Additional organizations should be identified for research purposes. Telephone interviews need to be conducted with elected leaders and office staff member of these organizations to gain more insights and lessons learned from their experience of serving their members and providing leadership for their respective fields. Following are some of the questions that could be asked through this follow-up research.

1. Annual reports of each organization.
2. How do larger organizations provide smaller and more intimate environments for their members to interact and feel supported?
3. How do organizations maintain cohesiveness as well as encourage autonomy and delegated responsibility among operating units? For example, what successful lessons could guide an organization that included major divisions within it defined by their major job responsibilities or academic content areas (*e.g., reading, English, peer learning*)?
4. What is the size and function of central office staff for the professional association?
5. Information about association membership (*e.g., number of members, fee structure of membership, categories of membership, services provided for each membership category, institutional and corporate memberships*)
6. What is the financial profile of the association (*e.g., annual operating budget, financial assets, reserve funds, number of members [e.g., national, chapter], revenue sources [national conference, on-line workshops, publication sales, membership dues, interest on reserve funds, corporate contributions]*).
7. If the organization is hosted at a particular institution, what benefits are provided by the host college?
8. What qualifications are required for election to national executive board positions?
9. What are the job responsibilities for elected officials and the central office staff? How are the roles differentiated between these two groups to maximize service to the association? What sort of training is provided for incoming board members?
10. What auxiliary income is generated to support the association and benefits to its members (*e.g., advertising in publications; corporate sponsorships at conferences, through the association website, and other venues; foundation that accepts corporate gifts and bequests from estates; estate planning services; sales of publications and services; on-line webinars and training workshops; residual income due to direct marketing of members on behalf of affinity insurance and credit card programs; etc.*)
11. What is the relationship between the national association and its chapters? What services are provided by the national to the chapter? Is it possible to be a member of the chapter without simultaneous membership in the national?
12. What are the services provided to the members?
13. How do the chapters and the association relate to each other?
14. Comparison and contrast chart among the organizations:
 1. Total number of members (*include grand total and breakdown by membership category if available*).
 2. Average annual membership fee (*average all membership revenue collected divided by total membership*)

3. Total annual operating budget
4. Total net revenue generation
5. Total reserve fund accounts
6. Total FTE of paid professional staff
7. Per capita annual operating budget (*total annual operating budget divided by total membership*)
8. Per capita paid professional staff (*total FTE of paid professional staff divided by total membership*)
9. Per capita reserve funds (*total reserve fund accounts divided by total membership*)
10. Percent of annual net revenue generated through the national conference